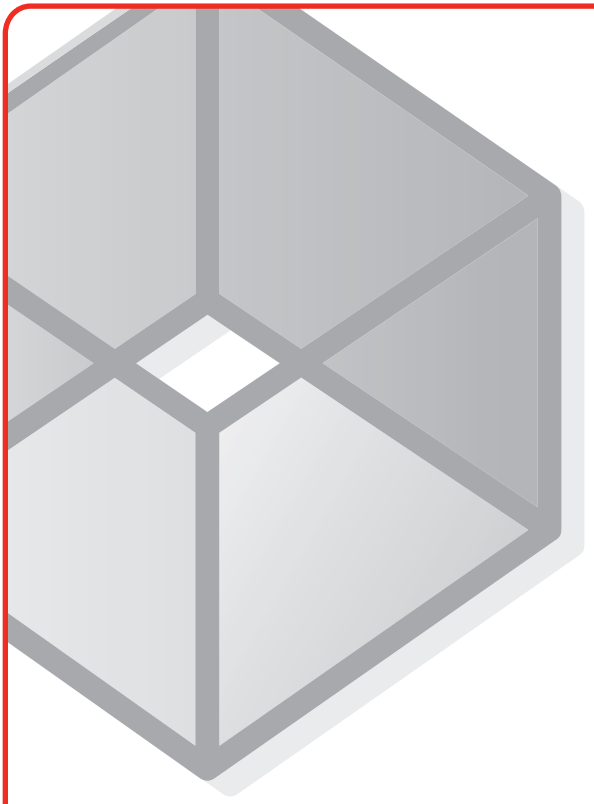
Maximizer™ CRM11



User's Guide

Maximizer Software
Simply Successful CRM

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Applicability

This document applies to Maximizer CRM 11 software.

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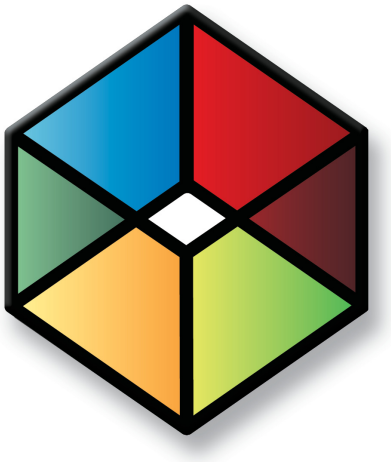


CHAPTER 1

Welcome to Maximizer

Introducing Maximizer CRM

In this chapter...

"From Prospects to Leads to Repeat Customers" on page 2
"Maximizer Modules" on page 5
"Maximizer Companion Applications" on page 6
"Maximizer on the Web" on page 8
"Maximizer CRM Editions" on page 9
"Where to Go from Here..." on page 10

From Prospects to Leads to Repeat Customers

You are a growing company, looking to take your organization to the next level. To reach this goal and create long-term, profitable relationships with your customers, you need a cost-effective, flexible Customer Relationship Management solution to keep all your departments working together effectively.

Designed for small- and medium-sized businesses, Maximizer CRM 10.5 integrates sales, marketing, and customer service tools, enabling all customer touch points in your organization to face customers and prospects professionally through one voice.

Throughout the customer life cycle, as prospects from marketing are turned over to the sales department, and customers are passed onto service departments, Maximizer CRM makes it easy for your staff to share information, communicate with customers through multiple channels, and organize individual and team efforts. Making your customers feel like king, and giving you an edge over your competitors. After all, gaining new customers and retaining satisfied ones is what improving the bottom line and growing your business is all about.

Sales—Save Time, Close More Sales

Maximizer CRM enables your sales staff to manage, track, communicate, and report through all phases of the sales cycle to help them work more efficiently and close more sales. Only Maximizer CRM enables you to view the big picture of your customers, as well as the details of each one, so you can leverage each customer opportunity and maximize your total revenue. It is the only solution in its class to offer extensive flexibility, workgroup security, and advanced sales automation and collaboration features. Further, Maximizer CRM is easy to use for sales people so they spend less time on administrative tasks and more time on selling.

Marketing—Reduce Costs, Generate More Leads

Attracting attention and generating leads for the sales department is the foundation of marketing. Now Maximizer CRM integrates marketing in its total CRM solution to enable marketing departments to manage, track, and measure cost-effective marketing campaigns that deliver more qualified leads to your sales people. Using the Campaigns window, you can create highly targeted campaigns through profiling and qualifying to retain customers and increase business.

Customer Service—Increase Efficiency, Improve Customer Satisfaction

Attracting attention to your products and services is the foundation of Sales and Marketing, but consistent, high-quality customer service is the foundation for keeping your customers for life. After all, it is far more expensive to gain a new customer than it is to retain an existing one. Maximizer CRM enables you to cultivate and maintain long-term, profitable relationships by recording and quickly recalling every form of past contact with your customers, so you can exceed your customers' expectations and recommend the right solutions, at the right time. Cross-selling and up-selling are easy when you know your customer's history better than they can remember it themselves!

Anywhere Access

Your staff is spread out around the continent or around the world, they're on the go at client locations, but you can't afford to have any downtime or inaccurate customer information. Maximizer CRM's strength is in its capability to give your staff access to critical data from anywhere, at any time, on any device—at a remote office, through the web, or on a BlackBerry device.

Remote Access Through MaxExchange

For users in remote offices to effectively team-sell and face clients and prospects with accurate information, they need to have access to up-to-the-minute data. MaxExchange enables Maximizer CRM users to work from a single database that is regularly synchronized to keep everyone current.

BlackBerry Access Through MaxMobile

For the mobile sales force, MaxMobile enables you to easily access your Maximizer CRM information from a BlackBerry device. You can then update or add information while out of the office.

Refer to the MaxMobile online manual for more information.

Web Access

Maximizer's web access sites are browser-based tools that improve your organization's efficiency by enabling you and your staff to carry out everyday tasks, from wherever you are, with any computer. See the Maximizer on the Web chapter for more information.

Extend Maximizer CRM to Fit Your Needs

The Maximizer CRM Customization Suite includes additional guides for integrating with Maximizer. The Customization Suite enables customers and business partners to customize the Maximizer interface and to integrate with other front-office and back-office solutions.

Maximizer Modules

Maximizer

Maximizer CRM is a robust customer relationship management solution that tightly integrates your contact manager, customer service, and sales requirements.

Maximizer's customer service, knowledge base, and order management features allow you to track and retrieve all customer queries, issues, resolutions, and purchases. Opportunities provide customizable sales strategies that can be used by your sales team to track, communicate, and report through all phases of the sales cycle, with the probability of close being calculated at every stage.

With the creation of meaningful graphs and charts, companies benefit from complete, detailed intelligence to fully understand their audience and evaluate the performance of their business.

The Campaigns window provides you with a tool to set up automated campaigns—a series of highly-targeted automated email, fax, or print documents—that introduce services, encourage product purchases, promote website visits, or distribute electronic newsletters. Once you have defined the various campaign pieces, and launched the campaign, the process is entirely automated. You can also create "traditional" marketing campaigns that coordinate the activities of marketing team members.

Administrator

Administrator is typically used by a system administrator or other technically-proficient staff to configure and manage the entire Maximizer application. Among other administrative tasks, Administrator is used to create and manage Maximizer users, apply licensing, and create new databases (or "Address Books").

You can also do tasks that are common to both Maximizer and Administrator such as back up data, import and export data, produce system reports, and set up and manage sales/marketing teams and security groups.

Maximizer Companion Applications

There's more to Maximizer CRM than just the main modules. See the following descriptions of our Maximizer companion products.

MaxMobile

Combined with Maximizer, MaxMobile forms a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of a BlackBerry device. Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes, as well as opportunities and customer service cases. Simply use either application to record additions, changes, and deletions between the two products.

Accounting Link

Maximizer offers the following accounting integrations: Accounting Link Designed for Use with QuickBooks®, Accounting Link for Microsoft Dynamics™ GP, and Accounting Link for Sage 50 Accounts. Accounting Link enables you to create estimates, invoices, and purchase orders from within Maximizer and share them with your QuickBooks, Microsoft Dynamics GP, or Sage 50 Accounts software.

Microsoft SQL Server Reporting Service Viewer

For more information on configuring Maximizer for use with Microsoft SQL Server Reporting Services, see the Administrator's Guide.

Maximizer CRM includes a Microsoft Report Viewer in the installation. Microsoft Reporting Services is a comprehensive reporting tool that integrates with a diverse set of data sources. The full installation for the SQL Server Reporting Services is available from the Microsoft SQL Server CD.

MaxExchange

MaxExchange is a separate Maximizer application that is opened from the Start menu. It allows you to synchronize Maximizer data between a server and remote computers.

For administrators of MaxExchange, refer to the *MaxExchange Administrator's Guide*.

Workflow Automation Powered by KnowledgeSync

Workflow Automation Powered by KnowledgeSync is a separate Maximizer application that allows you to monitor business data within the Maximizer database and other systems. Potential issues are identified before they create problems so that the people who need to know can act on the information. With Workflow Automation, you can apply business rules to all of your data—no matter where it resides—and learn of potential issues while there is still time to act.

Using Workflow Automation, you can send flexible real-time alert messages via email, fax, pager, PDA (such as Palm or Handspring), and webcast. It's easy to schedule and deliver reports. Lead qualification, lead assignment, and lead tracking are completely automated. Powerful and flexible, the Workflow Automation Suite is quickly deployed, simple to use, and easy to administer so you can focus on building successful, profitable customer relationships.

MaxAlarm

MaxAlarm is a Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start your computer, and you can leave it running with or without running Maximizer, and still be notified of appointments. You will know if MaxAlarm is running because its icon appears in your Windows System Tray, which is in the lower right corner of your screen.

MaxAlarm is easy to use. Simply add one or more Address Books to MaxAlarm, minimize it and then forget about it—until the Alarm dialog pops up to remind you of an appointment. With MaxAlarm's Review feature, you can review today's appointments without opening an Address Book in Maximizer.

Maximizer on the Web

Maximizer's web access sites give remote users access to the central Maximizer database via the web.

Maximizer Web Access

Maximizer Web Access is a browser-based application providing you with the functionality of Maximizer from anywhere in the world. You can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, opportunities, automated campaigns, customer service cases, knowledge base articles, and Company Library documents.

- Reporter improves your marketing and selling campaigns by reporting on the success of your current and past strategies. Reporter provides you with several report templates allowing you to produce impressive results in just a few seconds.
- Dashboards are part of Maximizer and Maximizer Web Access and can be used for monitoring the activity occurring in your company. The information you see in dashboards is generated in "real-time", so you have an up-to-date view of the activities taking place in Sales and Marketing. Information such as how many opportunities are in the funnel and your daily revenue from online purchases can be accessed instantaneously.

Partner Access

Partner Access is a browser-based application providing a two-way flow of information between your organization and its business partners. This allows for a multi-tier distribution group to effectively distribute sales opportunities and leads, and to keep all involved parties informed about the latest news and customer service issues.

Customer Access

Customer Access is similar to Partner Access. It's a browser-based application providing a two-way flow of information between your organization and its customers. Customers have access to news, events, and customer service issues.

Wireless Access

Wireless Access provides access to Maximizer through any wireless Internet-enabled device.

Maximizer CRM Editions

There are two Maximizer CRM Editions:

- Maximizer CRM Group Edition
- Maximizer CRM Enterprise Edition

The availability of some functionality varies, depending on the edition you are running.

Functionality	Module	Group	Enterprise
Territory Management	Sales	☒	☑
Sales Quotas	Sales	☒	☑
Fax/Print Campaigns	Marketing	☒	☑
Web Reporting	Business Intelligence	☒	☑
Workflow Events	N/A	☒	☑
Dashboards	N/A	☑	☑
Enable/Disable Security[a]	Security	☑	☒
Advanced Security[b]	Sales	☒	☑
Global/Local option[c]	N/A	☑	See footnote [d]
Web access sites	N/A	☑	☑
Microsoft SQL Server Analytics	N/A	☒	☑
Microsoft SQL Server Reporting	N/A	☒	☑

a. Set in Administrator. (Select File > Preferences > System Options.) If security is disabled, you cannot set the following options: Read Access, Full Access, and Creator.
b. This option lets users select multiple users and groups for Full Access and Read Access in Address Book entries.
c. This option gives you access to Global and Local Address Book lists. Global Address Books are stored on the Maximizer server application. Local Address Books are stored locally on your computer.
d. Pertains only if MaxExchange Remote is installed.

Where to Go from Here...

Explore Maximizer in a safe training ground

The Maximizer Training Guide is designed to introduce you to the fundamentals of using Maximizer. Using the example of Escona Estate Wines—a fictitious vintner in the Sonoma Valley—you can follow tutorials that take you through real-world examples of how to use the various components of Maximizer. Daily tasks in marketing, sales, and administration give you the springboard you need as a novice user to start you on your way to being a Maximizer expert.

To order the Maximizer Training Guide, contact your nearest Maximizer office or your local Maximizer Business Partner.

CHAPTER 2

Getting Started

Start working in Maximizer CRM

In this chapter...

"Maximizer CRM" on page 12
"Maximizer Interface" on page 13
"Opening an Address Book" on page 19
"Lists of Entries" on page 22
"My Work Day" on page 25
"Getting Help" on page 27

Maximizer CRM

Maximizer CRM is specifically designed for small and medium-sized businesses and corporate divisions of large companies. By integrating sales, marketing, and customer service tools into one affordable solution, Maximizer CRM helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

Throughout this document, Maximizer CRM is referred to as Maximizer.

Throughout the customer life cycle, as prospects move from the marketing department to the sales department, and as customers are passed onto service departments, Maximizer CRM enables an organization to communicate with its customers through multiple channels, to share information, and to organize individual and team efforts.

Maximizer CRM is a complete software solution that brings together elements of CRM, enterprise contact management, marketing automation, rapid website development, wireless access, and other related applications to meet the sales, marketing, and customer service challenges of modern businesses.

- Managing your company's lists of Companies, Individuals (people not associated with a Company), and Contacts (people associated with a Company or Individual).
- Keeping track of your scheduled appointments and tasks.
- Pursuing a sale using a structured sales strategy and team-based selling.
- Managing customer service and your knowledge base operations.
- Promoting your product through traditional and automated campaigns.
- Sending letters, faxes, or email messages to one or many recipients.
- Managing incoming orders and inquiries from your online catalog—payment, refunds, shipping, and reporting.
- Organizing and accessing your sales and marketing literature in a shared library.
- Generating reports from any of the lists—Address Book entries, opportunities, customer service cases, Hotlist tasks, and additional information you keep on your entries.

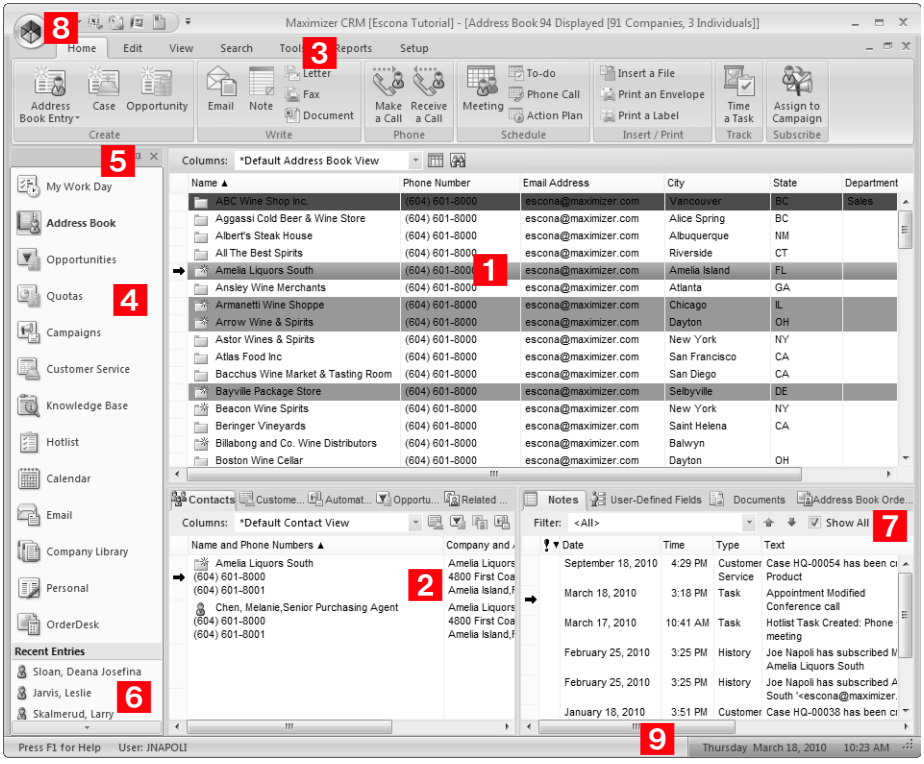
Maximizer Interface

Information in Maximizer is displayed in lists, which means that it can be sorted and arranged in rows and columns. Lists make it easy to see many entries at once and customize your views. Different types of information are viewed in different windows in Maximizer. You can easily move from window to window to access different types of entries.

Keep the following points in mind when working with the Maximizer windows.

1. Select or open **entries** in the list to view information and perform tasks on the entries.
2. View information and attached entries for the current entry in the tabbed **following windows**.
3. Use the **tabs** at the top of the window to access all tasks that are available in the current window. Each tab organizes tasks into groups. Select an icon to perform the task. You can also right-click to select common tasks from the shortcut menu.
4. Select an **icon** in the icon bar to move to a different window.
5. At the top of the icon bar, use the button with the **pin graphic** on it to hide or display the icon bar view.
6. In the **Recent Entries** area, select an Address Book entry that you have recently viewed to add it to the current list quickly.
7. Use the **view bars** in a window or following window to filter your list and access common tasks and the column setup. You can also use the arrow buttons to move from one entry to the next.
8. In the top-left corner of the window, select the **Maximizer** icon to access additional tasks, such as opening and closing an Address Book, printing reports, and viewing the online help.

9 Watch the **status bar** to see the current user, date, and time.



Maximizer Windows

The main Maximizer window is the Address Book window, which lists the Companies, Individuals, and Contacts in your Maximizer database (Address Book). The following list provides a brief description of each main window accessible from Maximizer.

My Work Day

The My Work Day view is an area where everyone in your company using Maximizer can view Hotlist tasks, appointments, and company announcements, as well as access to dashboards.

Address Book

The Address Book window contains all the information about your prospects, customers, business and professional associates, or any other group of people you deal with on a regular basis. It links you to related information about each Address Book entry, such as Contacts, Hotlist tasks, customer service cases, opportunities, campaigns, documents, user-defined fields, and orders and inquiries.

Opportunities

The Opportunities window helps you and your colleagues manage complex sales that involve the participation of more than one person in the buying decision and require the support of a sales team.

Use the Opportunities following window to view the opportunities associated with the entries selected in the Address Book window.

Quotas

The Quotas window allows you to keep track of your sales quotas. You can view the forecast, weighted, and won revenue of your opportunities compared to your quota for each month, quarter, or year.

Campaigns

The Campaigns window allows you to create and manage both traditional and automated campaigns. Marketing efforts are easily coordinated amongst your marketing teams. And, through the use of campaign templates, you can create campaigns quickly by modifying the campaign elements.

The Automated Campaigns following window displays all automated campaigns for the current entry in the Address Book window.

Customer Service

The Customer Service window supports and enhances your existing customer service business processes. All Address Book entry issues can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner. The Customer Service window is tightly integrated with the Knowledge Base window. When a case is resolved, you can enter an explanation of how the case was resolved and save the article in the Maximizer Knowledge Base.

The Customer Service following window displays the customer service cases associated with the current entry in the Address Book window. You can add and modify cases for the selected entry only.

Knowledge Base

The Knowledge Base window provides you with a library-style tool to manage your customer service solutions. The window is tightly integrated with the Customer Service window. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

Hotlist

The Hotlist is a to-do list of tasks and reminders that are usually timeless. The Hotlist is where you record actions and follow-up activities related to your interactions with Companies, Individuals, and Contacts. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Calendar

The Calendar window allows you to schedule, print, and view your appointments with Maximizer users or Address Book entries. Because the calendar works with the Peg Board feature, you can make sure that when you have an appointment, others can see when you are busy or out of the office. If you need to be reminded of an appointment, Maximizer can sound an alarm in advance of the appointment or task.

Email

The Email window provides you with the ability to send, receive, and preview email within Maximizer using your existing email system. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily. Additionally, you can transfer data files by email.

Company Library

The Company Library stores vital sales and marketing information for everyone to access. The Company Library window allows you to preview and open any note and many types of files in the preview pane.

Personal

The Personal window contains the Journal and Expenses windows, which provide a location to keep notes and financial records that are not associated with Address Book entries.

OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter a new order, capture a payment for an order, pre-authorize a payment for an order, complete a pre-authorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods. OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled.

Use the Address Book OrderDesk following window to view the orders and inquiries associated with the entries selected in the Address Book, Opportunities, or Customer Service window.

Contacts

The Contacts window displays the current Contacts for the Company or Individual selected in the Address Book, Customer Service, Campaigns, Hotlist, or Opportunities window. You can use this window to add, update, or delete a Contact.

Notes

The Notes window records your Address Book activities and displays only those notes that belong to the selected Address Book entry, customer service case, campaign, or opportunity.

User-Defined Fields

The User-Defined Fields window displays the custom fields for the selected Address Book entry, customer service case, campaign, or opportunity. You assign values to these fields, and, if your system administrator has given you the access rights, you can add, change, or delete user-defined fields.

Documents

The Documents window displays the document entries for the selected Address Book entry, customer service case, campaign, or opportunity. You can add new documents, as well as files not created in Maximizer, modify documents, or delete documents.

Accounting

You can access this window if you have the Accounting Link Designed for use with QuickBooks®, the Accounting Link for Microsoft Dynamics™ GP, or the Accounting Link for Sage 50 Accounts add-on component installed. This window contains all your invoices, estimates, and purchase orders for your Address Book entries. You can create these items in Maximizer and the transactions are automatically shared with your accounting application.

For information on using Accounting Link, see the online manual.

Opening an Address Book

Address Books can be opened in Administrator or Maximizer. There are no conflicts if you open an Address Book while it is being used by other users.

If you are running Maximizer CRM Group Edition (or MaxExchange Remote is installed), you must specify whether to access local or global Address Books in the drop-down list that is provided. A local Address Book is located on your own computer, while a global Address Book is located on a server computer other than yours. Use the global setting to access shared Address Books.

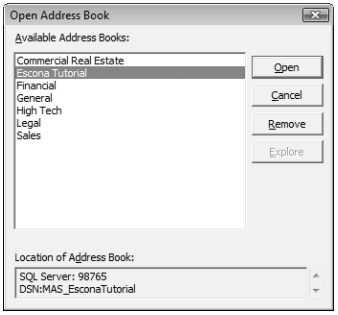
Under certain operating system configurations, your password may expire after a period of time. In this case, Maximizer will prompt you to change it. See your system administrator for more information.

➤ To open an Address Book

1. In the top-left corner of the window, click the **Maximizer** button, and select **Open Address Book**.

   The Open Address Book dialog box opens.

2. If the option is available, select **Local List** or **Global List**.



3. Select the Address Book to open, and click **Open**.

   The Login dialog box opens.

4. Type your password and click **OK**.

   The name of the Address Book appears in the application title bar.

The default password for new users and for the users in the sample Address Books is "maximizer".

➤ To log in to the current Address Book as another user

1. In the top-left corner of the window, click the **Maximizer** button, and select **Login**.

   – or –

   At the bottom of the window, double-click in the **User** section of the Maximizer status bar.

   The Login dialog box opens.
2. Enter a **user ID** and **password**.
3. Click **OK**.

Connecting to an Address Book

Maximizer allows you to connect to any shared Address Book on another computer. The computer can be a Maximizer workstation or a server. Once you have connected to an Address Book, you can access the Address Book from the Open Address Book dialog box.

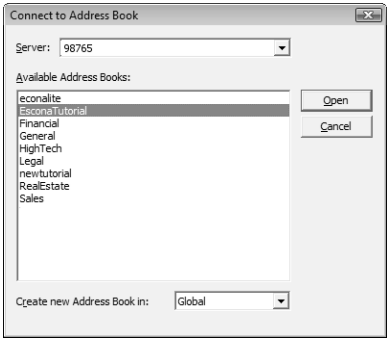
You can perform this procedure only if you have Maximizer CRM Group Edition installed.

Once the connection to an Address Book is established, it appears in the Open Address Book dialog box. You can use the Remove button in the Open Address Book dialog box to remove it from the available Address Book list.

➤ To connect to an Address Book

1. In the top-left corner of the window, click the **Maximizer** button, and select **Connect to Address Book**.

   The Connect to Address Book dialog box opens.
2. Select the computer that hosts the Address Book to which you would like to connect.
3. Select an Address Book from the **Available Address Books** list and click **Open**.



Once you connect to the Address Book, you are prompted with a message saying the connection was successful.

4 Click **OK** to close the message.

Lists of Entries

Maximizer is list-based. You can customize the information listed by changing the column setup, saving a Favorite List, or using a view filter. In some windows, you can tell how many entries and what types of entries are displayed in the current list by reading the title bar.

An important part of viewing information in a list-based window is sorting your list by different columns. By clicking on a column title, you can re-sort your list by that column. If you click the column title again, the list sorts in reverse order. Sorting entries by column works from left to right. For example, if you sort by a column that contains the City/Town field, entries with the same city/town will be sorted by the next column to the right. If you wish to change the order of the columns, change the column setup.

After selecting the column to sort by, you can quickly move to an entry by typing the character(s) with which the entry starts. For example, to reach an entry called "Seismic Explorations", type "se".

Filters are available for every window that has a View bar. Filters control the type and amount of data you want to see at any given time. Filters contain options that are specific to the type of data that is displayed in each window.

The following sections contain additional information on working with lists in Maximizer:

- "Types of Entries" on page 22
- "Selecting Entries" on page 23
- "Displaying Entries" on page 24

Types of Entries

Almost all of the information displayed in Maximizer is displayed in a list, including notes and documents attached to entries, email messages, and Calendar appointments. Maximizer contains main modules that list the following types of entries.

- **Address Book entries –** The main type of entry in Maximizer, they include Companies, Individuals, and Contacts that are attached to Companies or Individuals.
- **Opportunities –** Entries to keep track of sales opportunities, they are associated with Address Book entries.
- **Customer service cases –** Entries to keep track of customer service information, they are associated with Address Book entries.
- **Campaigns –** Entries to keep track of traditional and automated campaigns.

Selecting Entries

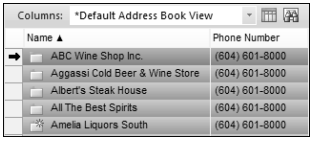
When you click on an entry, it becomes the current entry, marked with an arrow to the left of the entry. Most commands are performed on the current entry. The entries listed in the following windows depend on the current entry.

You can also select multiple entries to perform commands on many entries at the same time. The current entry may or may not be one of the selected entries. The current entry is shaded with a different color than the selected entries.

You can customize the color of current and selected entries. On the Setup tab, select Window > Window Settings > Set Color > Current/All Window from the Workspace group.

➤ To select entries

- Click on the gray box to the left of an entry.
- To select multiple entries, click on the entries one at a time while holding down the **Control** key.
- To select all entries between two entries, select an entry and, while holding down the **Shift** key, select another entry.
- To select or clear all entries in the current list, click the gray box in the top-left corner of the list. Or on the **Edit** tab, select **Select All** from the **List** group.



- To clear selected entries, on the **Edit** tab, select **De-select All** from the **List** group.
- To reverse which entries in the list are selected, on the **Edit** tab, select **Invert Selection** from the **List** group.

Displaying Entries

Some actions can be performed on the entire list of entries in a window There are some ways to quickly display and remove entries in a list.

➤ To display only selected entries

1. Select the entries that you want to display.
2. On the **Edit** tab, select **Make List Current** from the **List** group.

   The other entries are removed from the list.

➤ To remove all entries from a list

- On the **View** tab, select **Clear List** from the **Filter** group.

My Work Day

My Work Day is an area where everyone in your company using Maximizer can see Hotlist tasks, appointments, company announcements, and Dashboards.

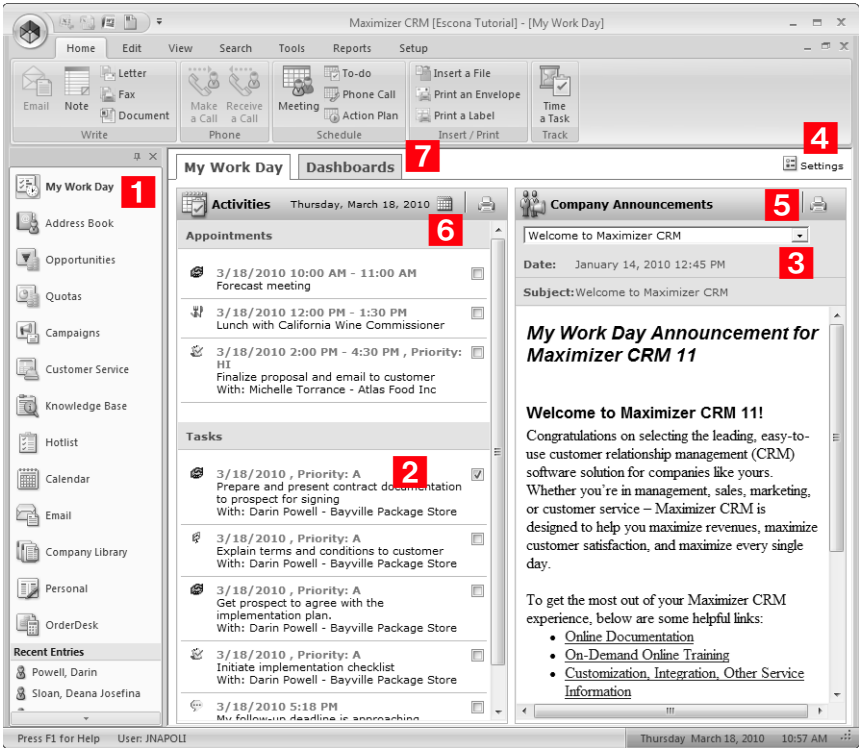
1. Select the **My Work Day** icon to open the My Work Day window.
2. Click on an **appointment** or a **Hotlist task** to view details of the activity.
3. Select a **company announcement** from the drop-down list to display it in the page.

   To add an announcement to the list, insert the announcement as a note, or as a text or an HTML document in the Company Announcements folder in the Company Library. You must refresh the window for the announcement to be visible in the list. (On the **View** tab, select **Refresh** from the **Window** group.)

You must be part of the Company Announcement Authors security group for your documents to display in the announcements list.

4. Click **Settings** to show or hide company announcements, tasks and appointments, or dashboards.
5. Select the **Print** icons to print activities or company announcements for the day.
6. Select the **Calendar** icon and select a date to display tasks and appointments for a different day.

7 Select the **Dashboards** tab to view your dashboards.



Getting Help

Maximizer Help is your comprehensive guide to working with the Maximizer modules. As you work with Maximizer, you probably already know what business task you want to accomplish—such as sending a fax to many recipients, building and publishing your online catalog, and recording your contact management information. Maximizer's help and guides have the answers you are looking for.

The types of documentation you can expect to find to help you with Maximizer include:

- **F1 Help –** Context-sensitive help for all windows and dialog boxes.
- **Contents Help –** Online step-by-step instructions with a table of contents, an index, and search.
- **Online manuals –** On-screen versions of the printed documentation that you can read using Adobe Acrobat Reader.

Whether you are looking for help using a particular dialog box or looking for instructions on how to perform an activity, you can always find what you are looking for in the Help. Maximizer Help provides not only step-by-step instructions for each module, but also detailed descriptions of every control in every dialog box and window.

The following sections contain additional information on getting Help in Maximizer:

- "F1 Help" on page 27
- "Contents Help" on page 28
- "Online Manuals" on page 29
- "Sample Address Books" on page 29

F1 Help

If you come across a window or dialog box you don't know how to use, press the F1 key to see brief descriptions of the window or dialog box options. Frequently, F1 Help topics have convenient links to related step-by-step instructions.

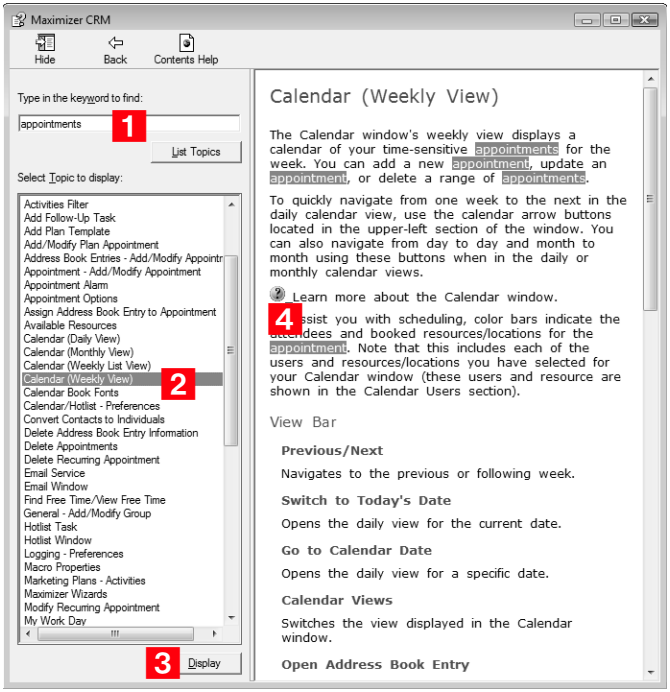
From the F1 Help window you can search the module's F1 Help for information on other windows, dialog boxes, or features—simply enter a keyword.

Keep the following points in mind when using the F1 help:

1. Enter a keyword and click **List Topics** to search for topics containing the keyword.
2. Topics containing your search keyword are displayed in the list.

3 Click **Display** to open the selected topic. You can also open a topic by double-clicking it.

4 Shortcuts link you directly to more information about what you are doing in the Contents Help.


Maximizer CRM
Hide
Back
Contents Help
Type in the keyword to find:
appointments
1
List Topics
Select Topic to display:
Activities Filter
Add Follow-Up Task
Add Plan Template
Add/Modify Plan Appointment
Address Book Entries - Add/Modify Appointr
Appointment - Add/Modify Appointment
Appointment Alarm
Appointment Options
Assign Address Book Entry to Appointment
Available Resources
Calendar (Daily View)
Calendar (Monthly View)
Calendar (Weekly List View)
Calendar (Weekly View)
2
Calendar Book Fonts
Calendar/Hotlist - Preferences
Convert Contacts to Individuals
Delete Address Book Entry Information
Delete Appointments
Delete Recurring Appointment
Email Service
Email Window
Find Free Time/View Free Time
General - Add/Modify Group
Hotlist Task
Hotlist Window
Logging - Preferences
Macro Properties
Marketing Plans - Activities
Maximizer Wizards
Modify Recurring Appointment
My Work Day
3
Display
Calendar (Weekly View)
The Calendar window's weekly view displays a calendar of your time-sensitive appointments for the week. You can add a new appointment, update an appointment, or delete a range of appointments.
To quickly navigate from one week to the next in the daily calendar view, use the calendar arrow buttons located in the upper-left section of the window. You can also navigate from day to day and month to month using these buttons when in the daily or monthly calendar views.
Learn more about the Calendar window.
4
ssist you with scheduling, color bars indicate the ttendees and booked resources/locations for the appointment. Note that this includes each of the users and resources/locations you have selected for your Calendar window (these users and resource are shown in the Calendar Users section).
View Bar
Previous/Next
Navigates to the previous or following week.
Switch to Today's Date
Opens the daily view for the current date.
Go to Calendar Date
Opens the daily view for a specific date.
Calendar Views
Switches the view displayed in the Calendar window.
Open Address Book Entry

Contents Help

You can look up Help topics the same way you would in a book—the table of contents lists the topics in a logical order, and the index lets you look up topics by keyword. Maximizer Help also lets you perform a search for any word or words in any topic.

You can access the Contents Help locally on your computer or online from the Internet. The local Contents Help opens as a separate application in its own window. The online Contents Help opens in a browser window.

➤ To open the Contents Help from Maximizer

- In the top-left corner of the window, click the **Maximizer** button, and select **Help > Local/Online Contents**.

➤ To open the Contents Help from another module

- Select **Help > Local/Online Contents**.

Online Manuals

A typical installation of Maximizer includes manuals in .PDF format that you can read online using Adobe Acrobat or Acrobat Reader. Having the Maximizer manuals in this format offers the advantage of full-text search, as well as hyperlinks on the table of contents, index, and any cross-references.

➤ To open an online manual

- In Maximizer, click the **Maximizer** button, and select **Help**. Then, under **Documents**, select the guide that you want to open.
- In another module, select **Help**, and select the guide that you want to open.
- From the **Start** menu, select **Programs > Maximizer CRM > Documentation and Help**, and select the guide that you want to open.

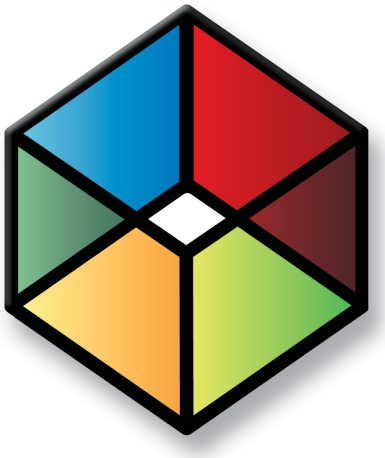
Sample Address Books

In a typical server installation of Maximizer, the Maximizer setup program creates several complete sample Address Books, one of which is named "Escona Tutorial". This Address Book is designed to be used as an environment in which you can learn how to use Maximizer.

Using the example of Escona Estate Wines, a fictitious vintner in California's Sonoma Valley, the Escona Address Book provides realistic examples of how Maximizer might be used to improve your customer relationship management.

The Escona Address Book includes detailed data related to all areas of Maximizer including the following:

- List of Address Book entries (Companies, Individuals, and Contacts)
- Sample sales opportunities and marketing campaigns
- Sample customer service cases
- Appointments and Hotlist tasks
- Sample Company Library files
- Fully enabled web access sites



CHAPTER 3

Address Book Entries

Keep Track of Companies and Contacts

In this chapter...

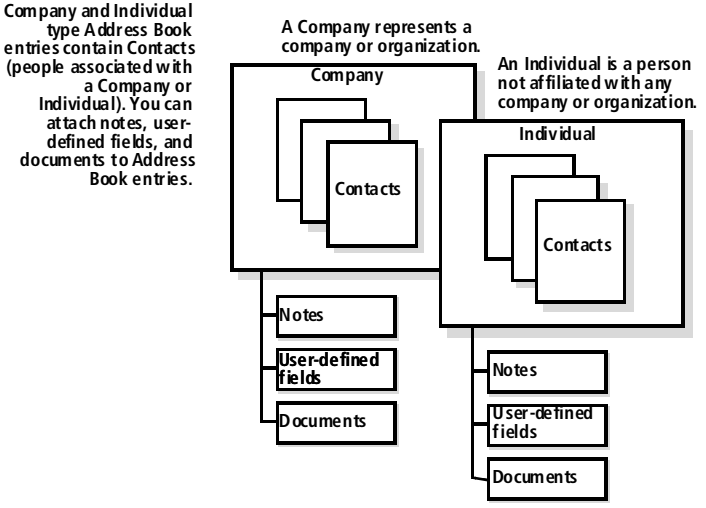
"About Address Book Entries" on page 32
"Adding Address Book Entries" on page 36
"Modifying Address Book Entries" on page 41
"Territory Management" on page 44
"Drawing Maps of Address Book Entries" on page 49
"Phoning Address Book Entries" on page 50
"Organizational Charts" on page 54

About Address Book Entries

Maximizer's focus is on Address Book entries—Companies, Individuals, and Contacts. Address Book entries can also be designated as sales leads to help you organize your information.

The Address Book window gives you the ability to manage your daily activities with companies, and the people who work for them. In addition to the basic Address Book information, including addresses, phone numbers, and email addresses, you can record other important information, such as relationships between companies or extra details, like the business type.

As you work with the Address Book entries in your Maximizer Address Book, you can keep notes on your activities, so you can always have a history of your activities with your customers.


Company and Individual type Address Book entries contain Contacts (people associated with a Company or Individual). You can attach notes, user-defined fields, and documents to Address Book entries.
A Company represents a company or organization.
Company
Contacts
Notes
User-defined fields
Documents
An Individual is a person not affiliated with any company or organization.
Individual
Contacts
Notes
User-defined fields
Documents

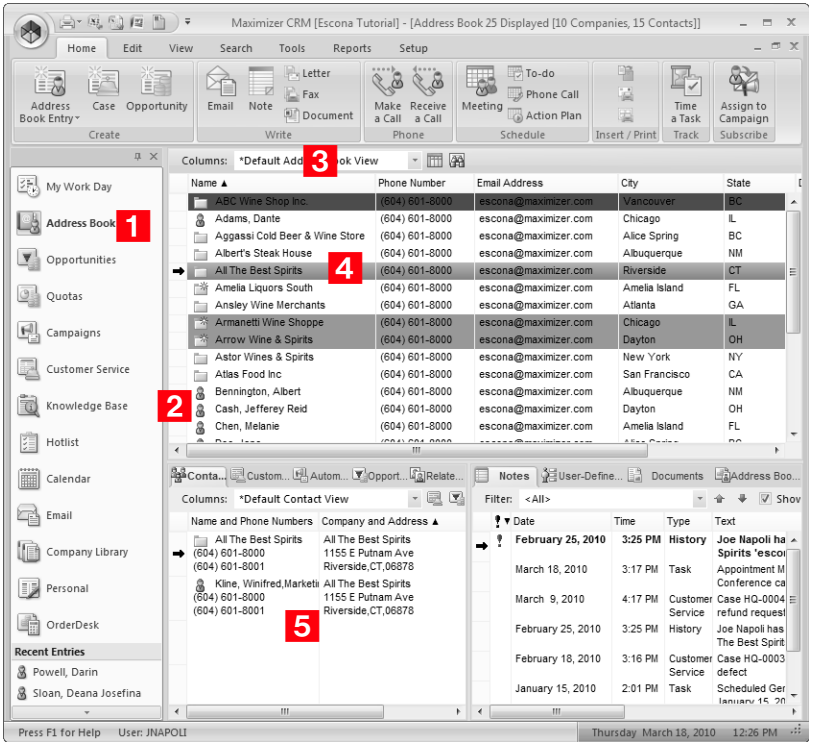
The following sections contain information on working with Address Book entries:

- "Address Book Window" on page 33
- "Choosing an Address Book List" on page 34
- "Viewing Address Book Entries" on page 35

Address Book Window

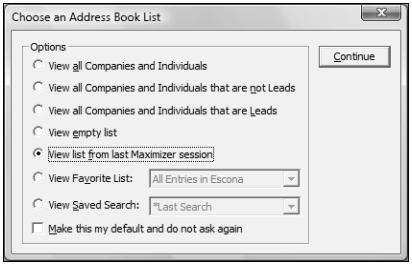
Typically, most of the activities on your Address Book entries are completed in the Address Book window. Keep the following points in mind when working in the Address Book window.

1. Select the **Address Book** icon to open the Address Book window.
2. Differentiate the **types** of entries with the icons representing Companies, Individuals, Contacts, Company Sales Leads, Individual Sales Leads, and Contact Sales Leads.
3. Use the **Columns** drop-down list to select a column setup and change the fields displayed in the window.
4. Double-click on an Address Book entry to open it.
5. Use the tabbed **following windows** to view more information and attached entries for the current entry in the main window.



Choosing an Address Book List

When you first open the Address Book window, you are prompted to choose an Address Book list to view.


Choose an Address Book List
Options
View all Companies and Individuals
View all Companies and Individuals that are not Leads
View all Companies and Individuals that are Leads
View empty list
View list from last Maximizer session
View Favorite List:
All Entries in Escona
View Saved Search:
Last Search
Make this my default and do not ask again
Continue

The following options are available for viewing an Address Book:

- All Companies and Individuals in the Address Book
- All non-lead Companies and Individuals in the Address Book
- All lead Companies and Individuals in the Address Book
- An empty list (no Address book entries displayed)
- The list from your last Maximizer session
- A Favorite List
- A saved search

If you want the list you select to be displayed every time you open the Address Book window, select the "Make this my default and do not ask again" option. If you later decide that you don't want the list to display by default, select the "Ask at Address Book startup which list to view" option in your preferences. (On the Setup tab, select Preferences.)

Viewing Address Book Entries

You can view and edit details of Address Book entries at any time. You can access an entry from the Address Book page or from a customer service case or opportunity attached to the entry.

➤ To view an Address Book entry

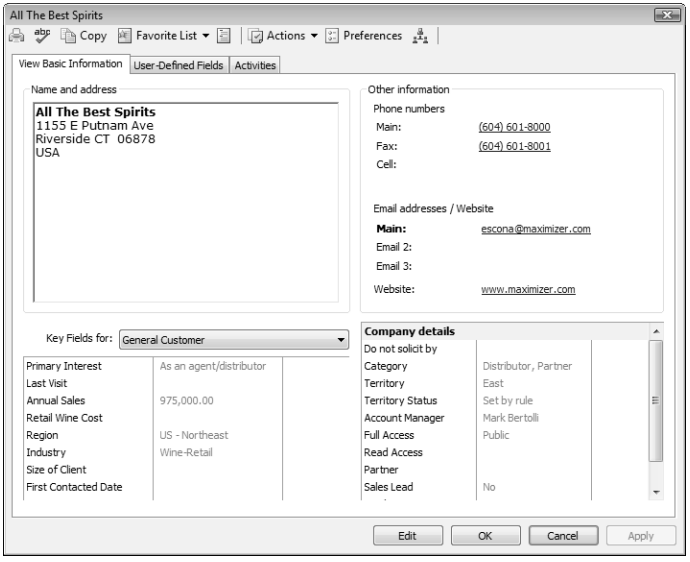
1. In the Address Book window, double-click on the entry to open it.

   The Address Book entry opens showing the information in the entry.

2. To modify the details of the entry, click **Edit**.

3. To view and modify other information related to the entry, select the **User-Defined Fields** and **Activities** tabs.

4. If necessary, click **OK** to save changes made to the Address Book entry.



Adding Address Book Entries

You can add Companies, Individuals, and Contacts to your Address Book. Typically, "Company" entries represent a corporate entity you would like included in your Address Book. "Individuals" represent a person who is not affiliated with a company or organization. "Contacts" are entries that are always associated with Companies or Individuals. "Address Book entries" refers to all Companies, Individuals, and Contacts in your Address Book.

If you need to add people to your Address Book, add them as Individuals or as Contacts of an Individual or Company. If you need to delete a Contact, its associated notes and documents are automatically transferred to the "parent" Company or Individual, which ensures you maintain a record of all interactions with a company, even during changes.

The following sections contain information on adding Address Book entries.

- "Adding Companies and Individuals" on page 36
- "Adding Contacts" on page 37
- "Adding Address Book Entries from Email" on page 38
- "Access Rights for Address Book Entries" on page 39

Adding Companies and Individuals

When you add entries for Companies and Individuals, you must specify all of the details on the entry. You can add Companies and Individuals as regular entries or as sales leads.

➤ To add a Company or an Individual

1. Select the **Address Book** icon to open the Address Book window.
2. On the **Home** tab, select **Address Book Entry > Company/Individual** or **Company/Individual Lead** from the **Create** group.

   – or –

   Right-click and select **Add > Company/Individual** or **Company/Individual Lead**.

   The Add Company or Add Individual dialog box opens.
3. Enter the basic information for the Company or Individual including **name**, **address**, **phone numbers**, and **email addresses**.

4. Select a **Key Fields** list and then select the appropriate fields for the entry.

   Key Fields are important user-defined fields specific to the various types of Address Book entries. They are defined by your system administrator in the Key Fields preferences in Administrator. (Select File > Preferences, and select the Key Fields tab.) An unlimited number of Key Fields lists can be set up using up to eight user-defined fields for each list.

5. In the **Company/Individual details** area, enter the entry's details such as the category. Click in the field, then click the ellipsis button to access possible values.

   If this entry is marked as a Sales Lead, and you would like the entry accessible to a partner, make sure you set the category to partner.

6. Select the **User-Defined Fields** tab and specify values for any additional user-defined fields. Make sure you select the field and then click inside the field on the right to access the possible values for the field.

   If necessary, select the **Show blank fields** option to display all fields in the Address Book, not only the fields with values defined in the entry.

7. Click **OK** to save the entry to the Address Book.

Adding Contacts

You can add Contact entries attached to existing Companies and Individuals. When you add a new Contact to the Address Book, you need to specify only fields that are different than the Company or Individual entry. You can add Contacts as regular entries or as sales leads.

➤ To add a Contact

1. In the Address Book window, select the Company or Individual entry.

2. On the **Home** tab, select **Address Book Entry > Contact** or **Contact Lead** from the **Create** group.

   – or –

   In the **Contacts** following window, right-click and select **Add > Contact** or **Contact Lead**.

   The dialog box for the new Contact opens. Some fields are populated with values from the Company or Individual entry.

3. Enter the basic information about the Contact, including the **name**, **position**, and **department**. And specify any additional information that differs from the Company or Individual entry.
4. Click **OK** to save the entry.

Adding Address Book Entries from Email

You can create Address Book entries from email messages in the Email window. Email messages are automatically saved as documents for the new Address Book entries. You can create Companies, Individuals, or Contacts with Companies from email messages. You can also create entries as sales leads.

➤ To add an Address Book entry from an email message

1. In the Email window, select the email message.
2. On the **Home** tab, select **Address Book Entry** from the **Create** group.

   – or –

   Right-click, and select **Create a New > Address Book Entry**.
3. Select the type of Address Book entry, and click **OK**.
4. Enter the details for the new entry, and click **OK** to save the entry.

   The Save Document dialog box opens.
5. Enter properties of the document including the name, owner, category, and description.
6. Click **OK** to save the email message with the Address Book entry.

The document name cannot contain the following characters: \ / : * ? < > |

Access Rights for Address Book Entries

For each Address Book entry, you can specify full access and read access rights for any Maximizer users or groups, or you can specify public access to grant access to all Maximizer users. Access rights to specific entries are shown in the Company/Individual/Contact details area of the Basic Information tab in the entry.

You can specify access rights while adding or modifying an entry. If you are using Maximizer CRM Group Edition, you can select a user, a group, or public from the Full Access and Read Access drop-down lists. If you are using Maximizer CRM Enterprise Edition, you can click the ellipsis button next to the Full Access or Read Access fields to select multiple users for full or read access rights.

Access rights for specific entries are granted in the Select Users for Full or Read Access dialog box. Keep the following points in mind when working in this dialog box:

The Select Users for Full or Read Access dialog box is available only in Maximizer CRM Enterprise Edition.

1. In the **Available users and groups** area, select a user or group to add to the list of users and groups with access to the entry.

   Users are grouped by the departments, divisions, groups, and teams to which they belong if you have the "Display users by groups" option enabled in your preferences. (On the Setup tab, select Preferences.)

2. Click the **arrows** to expand or collapse groups of users.

3. Click **Add** to move the user or group to the Selected users and groups list.

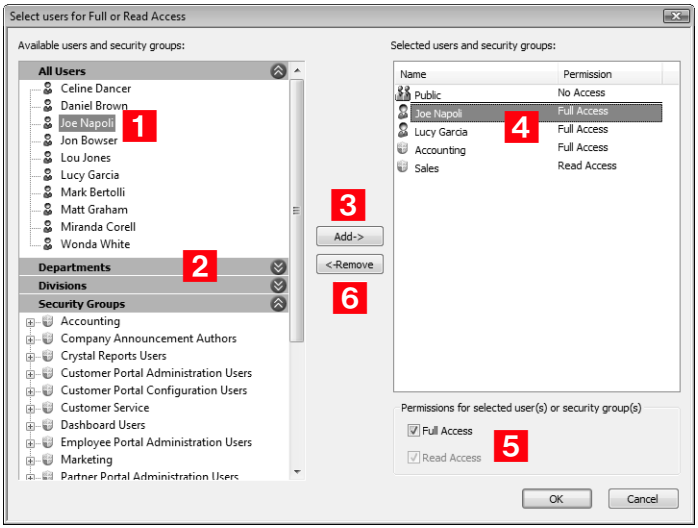
   If you accessed the dialog box from the Read Access field, the user or group is automatically assigned read access. If you accessed the dialog box from the Full Access field, the user or group is automatically assigned full access.

4. In the **Selected users and groups** area, select a user or group to modify the access rights for the user or group.

5. Select or clear the **Full Access** or **Read Access** checkbox to modify the access rights for the selected user or group.

6. Click **Remove** to remove the selected user or group from the list, stripping all access rights for the user or group.

Public cannot be removed from the list. Public access rights are automatically changed when users or groups are given access rights to the entry.



Modifying Address Book Entries

When you open an Address Book entry, you can click Edit to modify the details of the entry. You can perform a number of other tasks to change the properties of Address Book entries, including adding alternate addresses to entries, converting Individuals to Companies and Contacts to Individuals, and recording relationships between Address Book entries.

The following sections contain information on modifying Address Book entries:

- "Adding Alternate Addresses for Address Book Entries" on page 41
- "Converting Individuals to Companies and Contacts to Individuals" on page 42
- "Recording Relationships with Related Entries" on page 42

Adding Alternate Addresses for Address Book Entries

While the main address is specified in the Basic Information tab of an Address Book entry, you can also add alternate addresses for entries from the same tab.

➤ To add an alternate address for an Address Book entry

1. Open the Address Book entry.
2. Click **Edit**.
3. Click the **Address** button next to the **Address 2** field.

   The Mailing Address dialog box opens.
4. Click **Add** to enter a new address.

   You can also click **Modify** to change an existing alternate address.
5. Specify the new address, and click **OK**.
6. To set the address as the default (or main) address, select the address and click **Select.**
7. Click **OK** to return to the Address Book entry.

Converting Individuals to Companies and Contacts to Individuals

If you originally created an entry as an Individual and now decide the entry is more appropriate as a Company with Contacts, you can convert the entry.

In the conversion, Maximizer copies the entire contents of the Individual to a new Company entry with the Individual converted to a Contact for the Company. All data is converted, including the Individual's Contacts. The original Individual is automatically deleted in the process.

Additionally, you can convert Contacts to Individuals. You are asked to confirm if you want the new Individual to inherit the Contact's address. All data is transferred to the new Individual entry and the original Contact is automatically deleted.

Any number of Contacts or Individuals can be converted at once.

➤ To convert Address Book entries

1. Select the Individuals or Contacts that you want to convert.
2. On the **Edit** tab, select **Convert Individuals to Companies** or **Convert Contacts to Individuals** from the **Relate & Convert** group.

   – or –

   Right click and select **Convert Individuals to Companies** or **Convert Contacts to Individuals**.
3. Click **OK** to confirm the change.

Recording Relationships with Related Entries

In the course of business, it's common to have people and companies who are somehow related or connected to each other. For example, one of your contacts might be another's accountant. Maximizer allows you to view these types of relationships in the Related Entries window.

Any Address Book entry can be related to another. All notes, user-defined fields, and documents associated with a related entry are then linked to the relationship. If an Address Book entry has entries related to it, these are displayed in the Related Entries following window.

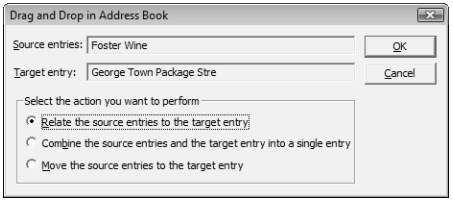
Occasionally, relationships that you set up between two Address Book entries change, and you may want to remove relationships between entries. You can unlink two entries to remove the relationship.

➤ To relate two entries

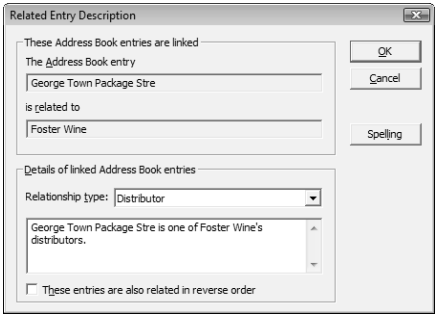
1. Select the two Address Book entries you wish to relate to each other. Then, on the **Edit** tab, select **Relate Entries** from the **Relate & Convert** group.

   – or –

   Drag an entry and drop it on to another entry. Then, select **Relate the source entry to the target entry**, and click **OK**.


Drag and Drop in Address Book
Source entries: Foster Wine
Target entry: George Town Package Stre
OK
Cancel
Select the action you want to perform
Relate the source entries to the target entry
Combine the source entries and the target entry into a single entry
Move the source entries to the target entry

2. Specify the details of the relationship between the two entries, and click **OK**.


Related Entry Description
These Address Book entries are linked
The Address Book entry
George Town Package Stre
is related to
Foster Wine
OK
Cancel
Spelling
Details of linked Address Book entries
Relationship type: Distributor
George Town Package Stre is one of Foster Wine's distributors.
These entries are also related in reverse order

➤ To unlink Address Book entries

1. In the **Related Entries** following window, select the entry to unlink.
2. On the **Edit** tab, select **Unlink Selected Entry** from the **Relate & Convert** group.

Territory Management

Use Territory Management to set up territories and assign them to Company and Individual Address Book entries. You can assign the territories manually, or automatically through the application of territory rules.

Territory Management is available only in Maximizer CRM Enterprise Edition.

To use Territory Management, you must be assigned the Sales Manager user role.

Once territories are created and assigned, any Maximizer user can use the Territory and Territory Status fields in everyday tasks such as searching for entries, adding column setups, inserting merge fields, and creating reports.

You cannot set up or align territories on MaxExchange Remotes and Remote Servers. You can, however, assign territories manually.

Users who are not Sales Managers can manually assign territories while creating a new Address Book entry. They can also assign a territory to an existing entry if a territory is not assigned and the Account Manager field is blank. When a user assigns a territory, "Set by user" is displayed in the Territory Status field.

The following sections contain additional information on Territory Management.

- "Setting Up Territories" on page 44
- "Assigning Territories" on page 46
- "Aligning Territories" on page 47

Setting Up Territories

When you set up a territory, you can define rules that an Address Book entry must match to be assigned to the territory during an alignment. To build the rules, use fields such as City, Country, State/Province and Zip/Postal Code. You can also use user-defined fields.

During an alignment, entries are tested against territories in the order the territories appear in the Territory list. If an entry matches the rules of more than one territory, the territory appearing higher in the list is assigned to the entry.

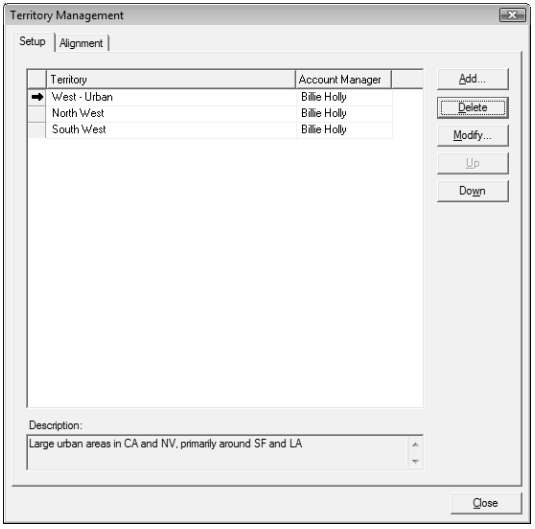
All entries match a territory that does not contain any rules. So if you create such a territory, it is placed by default at the bottom of the Territory list. Otherwise, entries matching the rules of territories appearing after it would not be matched to these territories. Instead they would be matched to the territory without rules.

➤ To set up a territory

1. On the **Setup** tab, select **Territory Management** from the **Territory** group.

   The Territory Management dialog box opens.

ⓘ The Territory Management command is available only to users with the Sales Manager role.



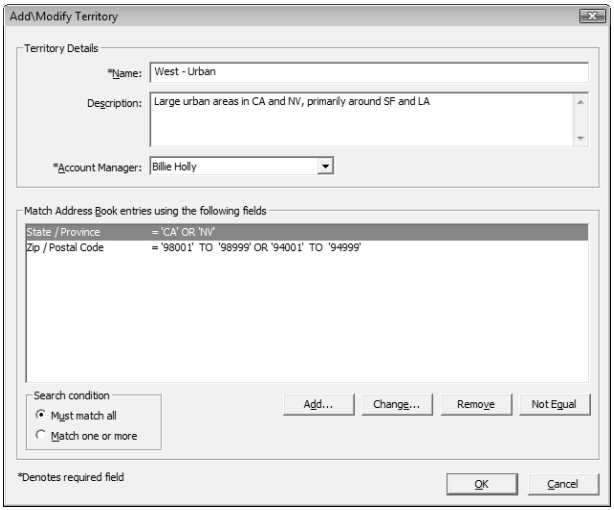
2. Click **Add**.

   The Add/Modify Territory dialog box opens.

3. Enter a territory name and a description of the territory.

4. From the **Account Manager** drop-down list, select an account manager.

5. Click **Add** to select the fields you need to define territory rules.



6. Specify whether Address Book entries must match all, or one or more of the territory rules.
7. Click **OK**.

   The new territory is added to the Territory list.
8. If required, use the **Move Up** and **Move Down** buttons to move the territory in the list.

If an Address Book entry matches the rules of more than one territory, the territory appearing higher in the Territory list is assigned to the entry.

Assigning Territories

Users can manually assign territories and account managers to Address Book Entries on the Edit Basic Information tab of open entries.

Changes to territory status are logged to an entry's notes.

➤ To assign a territory to an Address Book entry

1. Open the Address Book entry to which you want to assign a territory.
2. From the **Territory** drop-down list in the **Company details** area, select the territory you want to assign to the entry.

   The Territory status field now indicates that the territory is "Set by manager".

3 From the **Account Manager** drop-down list, select a user as the account manager.

4 Click **OK**.

Aligning Territories

Users with the Sales Manager role can automatically assign territories in the Alignment tab of the Territory Management dialog box. Changes made when you align territories override territories set by Sales Managers only if you select the "Overwrite territories set by manager" option.

Territories set by users are always overwritten by territory alignments.

If the alignment assigns a territory to an entry, the name of the territory is displayed in the Territory field, and the value "Set by rule" is displayed in the Territory Status field. If no territory is assigned to an entry (and one has not been set manually), the value in the Territory Status field is "Unassigned".

The value "Set by rule (unaligned)" is displayed in the Territory Status field when:

- An entry previously assigned to a territory no longer matches the territory rules. (The rules or the entry have changed.) However, if the entry matches the rules of another territory, it will be aligned to that territory.
- A territory that was set by a user at the time of the entry's creation does not match the rules of the territory it was assigned to or the rules of any other territory.
- A territory that was assigned to an entry by a Sales Manager does not match any territory rules, and the "Overwrite territories set by manager" option is selected.

➤ To align territories

1 On the **Setup** tab, select **Territory Management** from the **Territory** group.

2 Select the **Alignment** tab.

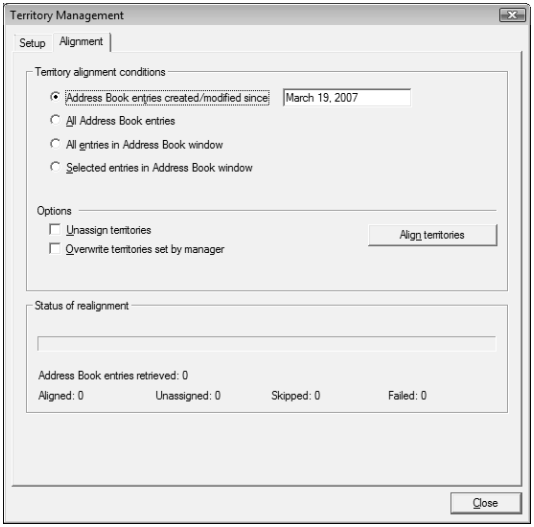
3 Specify the territory alignment conditions.

For example, if you want territories aligned for all Address Book entries, select the All Address Book entries option.

4 Specify the alignment options.

- Select **Unassign territories** to unassign territories from Address Book entries.
- Select **Overwrite territories set by manager** to overwrite territories that were set by Sales Managers.

5 Click **Align Territories**.



Drawing Maps of Address Book Entries

You can quickly draw a map showing the location of an Address Book entry or of the Address Book entry associated with an opportunity or customer service case. You can choose to view only the location of the entry, or you can view directions to or from the Address Book entry and your current address.

➤ To draw a map of an Address Book entry

1. Select an Address Book entry, opportunity, or customer service case.
2. On the **View** tab, select **Map** from the **Show** group.

   The Draw a Map dialog box opens displaying the address of the current Address Book entry.
3. Under **Draw this type of map**, select the type of map that you want to view.

   You can choose the following types of maps:

   - Map of selected entry only.
   - Map of travel route from current address to selected entry.
   - Map of travel route from selected entry to current address.
4. If necessary, enter your address in the **Current address** fields.
5. Click **OK**.

   A new browser window opens to a page displaying the address for the map.
6. Choose an online map site and click **OK**.

Phoning Address Book Entries

With Maximizer, you can quickly dial an Address Book entry, make a series of phone calls, receive calls, and record incoming and outgoing phone call activities in the Phone Log. Depending on your logging preferences, notes are automatically saved to the entries associated with the calls.

You can enable logging for phone calls in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

Users can transfer incoming calls to any other phone extension in the phone company's system. If a note is logged for the phone call transfer, the logged note includes the transfer information.

Use the Previous and Next buttons in the Phone dialog box to work through the current Address Book entry list.

If you are using TAPI, you can phone entries directly from Maximizer. Otherwise, you can still use Maximizer to log phone calls with Address Book entries.

The following sections contain additional information on phoning Address Book entries:

- "Logging Phone Calls with Address Book Entries" on page 50
- "Setting Up Automatic Dialing" on page 53

Logging Phone Calls with Address Book Entries

You can use Maximizer to log phone calls with Address Book entries. When you phone an Address Book entry or receive a phone call from an Address Book entry, you can take notes while the call is timed.

Depending on your logging preferences, notes are automatically saved to the Address Book entries, customer service cases, or opportunities associated with the calls.

After completing a phone call, you have the option of scheduling a follow-up activity saved to your Hotlist.

If you are using TAPI, follow this procedure to phone Address Book entries directly from Maximizer.

➤ To phone an Address Book entry

1. Select the Address Book entry to call.
2. On the **Tools** tab, select **Phone** from the **Other** group.

   – or –

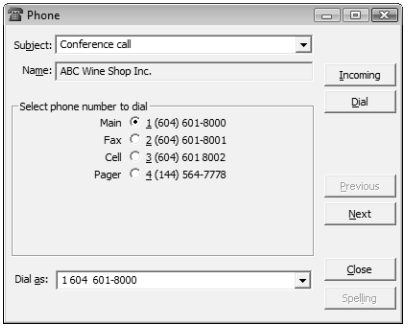
   On the **Home** tab, select **Make a Call** from the **Phone** group. Or right-click and select **Phone > Make a Call**. Then, skip to Step 5.

   The first phone number associated with the Address Book entry is automatically selected as the number to dial.

3 Specify the phone number and subject of the phone call.

- In the **Subject** field, select or type the subject of the call.
- In the **Select a phone number to dial** area, select the phone number to dial.
- In the **Dial as** field, select the format of the phone number.

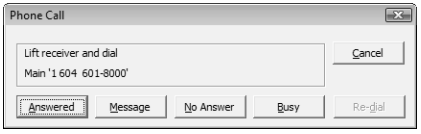
  Phone number formats are set up in your dialing preferences. (On the Setup tab, select Preferences, and select the Dialing tab.)



4 Click **Dial**.

5 In the Phone Call dialog box, choose a response.

For example, if the call is answered, choose Answered.



The Phone dialog box appears.

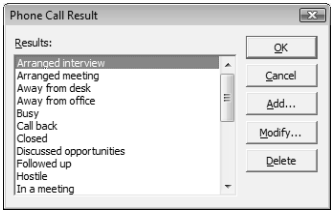
6 Record notes on your call as you talk.

7 When you are finished, click **Hang Up**, and then click **Save**.

In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

00:45 - Phone
Subject: Discuss Spring/Summer Product Line Agreement
Name: Duran, Bryce for opportunity with BridgeHead Winery
Greetings,
Mary-Beth says BridgeHead is very interested in the new Spring/Summer product lineup and is eager to proceed with the order. She will finalize the details with the CEO and get back to us early next week.
Hang Up
Pause
Reset
Hold
Transfer
Cancel
Spelling

8 Optionally, record the result of the outgoing call in the Phone Call Result dialog box, and click **OK**.



➤ To receive a phone call

1 Select the Address Book entry.

2 On the **Tools** tab, select **Phone** from the **Other** group. Then, click the **Incoming** button in the Phone dialog box.

– or –

On the **Home** tab, select **Receive a Call** from the **Phone** group.

– or –

Right-click and select **Phone > Receive a Call**

3 Select or type a **Subject** for your phone call.

4 Record notes on your call as you talk.

5 When you are finished, click **Hang Up**, and then click **Save**.

6 Optionally, record the result of the outgoing call in the Phone Call Result dialog box, and click **OK**.

In order for the Phone notes dialog box to appear automatically, logging must be enabled for phone calls in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

➤ To transfer a phone call

1. When you have an incoming call that you would like to transfer, click the **Transfer** button in the Phone dialog box.
2. In the **Display name** list, select a user, or enter a valid extension for your company's phone system.

   Note that a phone extension does not have to be associated with a user in the current Address Book.
3. Click **OK** to complete the transfer.

Setting Up Automatic Dialing

If you have a modem installed in your computer, you can configure Maximizer to dial the phone for you when you make a phone call using the Phone feature in Maximizer. Before Maximizer can use your modem, you must first make sure that your modem functions correctly with your computer system, then configure your modem in your dialing preferences in Maximizer.

Your modem preferences tell Maximizer where your computer's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not work at all. But if you set up your baud rate incorrectly, the modem will operate but perhaps at a slower speed.

TAPI lets you use your Telephony Application Programming Interface modem to identify and direct signals received by your communications port to the appropriate application.

For more information on setting up dialing preferences, including documentation on using TAPI, refer to the *Maximizer CRM Administrator's Guide*.

➤ To set up automatic dialing from Maximizer

1. On the **Setup** tab, select **Preferences**.
2. In the **Dialing** tab, select **Modem** or **TAPI**.
3. If you selected TAPI, click **Properties** to configure the dialing properties for the modem, and click **Device** to configure the Device properties for the modem.

   – or –

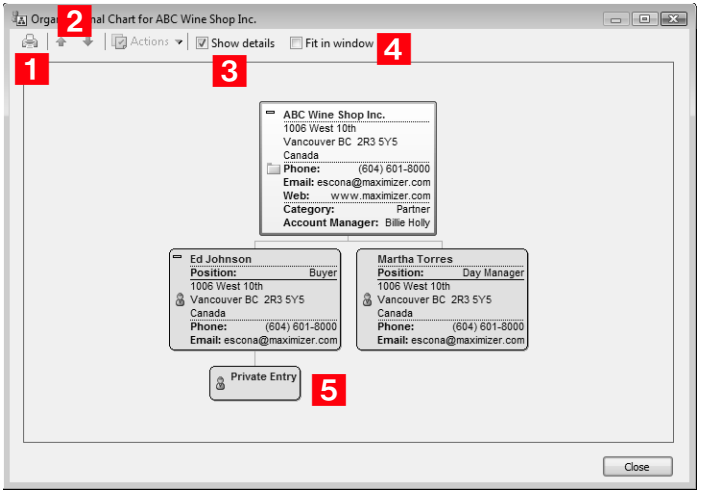
   If you selected Modem, fill in the remaining fields.
4. Click **OK**.

Organizational Charts

Organizational charts display the hierarchical structure of a Company or an Individual entry. The chart shows the entry's associated Contacts in a hierarchical format. The Company's organization is based on values in the Reports to field for each Contact.

Keep the following points in mind when working with an organizational chart:

1. Use the **Print** button to print the organizational chart.
2. Use the **Previous entry** and **Next entry** buttons to view the organizational chart for the previous or next entry in the Address Book list.
3. Select or clear the **Show details** option to show or hide details or the Contacts.
4. Select the **Fit in window** option to fit the entire organizational chart into the dialog box.
5. **Private Entry** displays in place of the entry details if users do not have rights to view a particular Address Book entry.



➤ To view an organizational chart for an Address Book entry

1. Select the Address Book entry.
2. On the **View** tab, select **Organization Chart** from the **Show** group.

Modifying Organizational Charts

You can modify the structure of organizational charts in two ways:

- Change the value in the Reports to field in the Contact details section of the Edit Basic Information tab in an open Contact or in the user's general properties.
- Drag and drop an entry to the another entry the Contact or user reports to.

  The Reports to field automatically updates showing the new value.

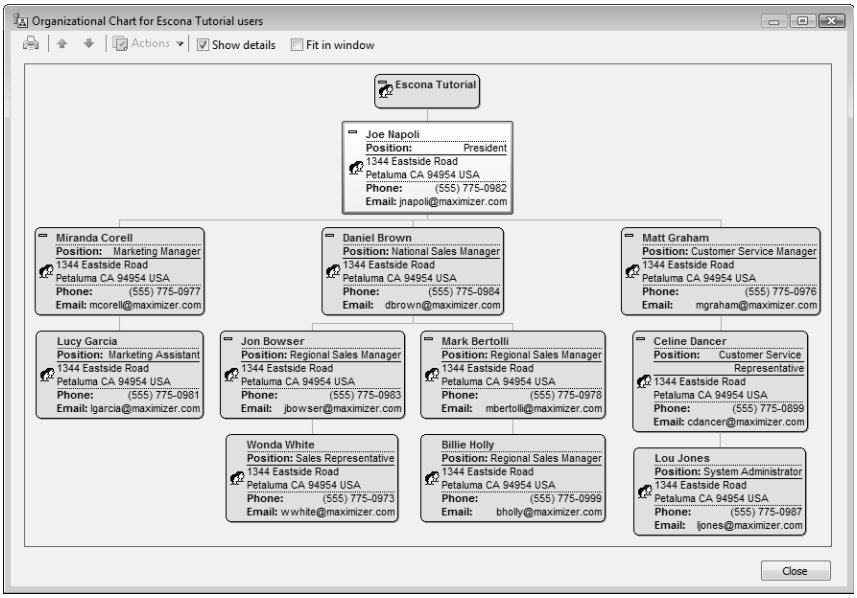
Organizational Charts for Maximizer Users

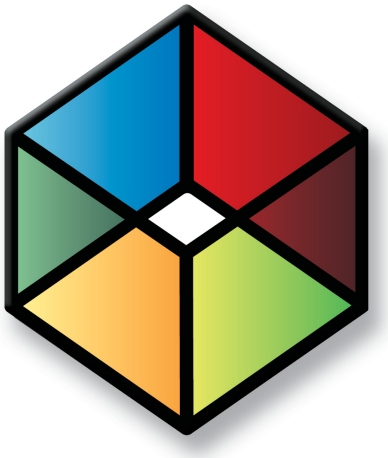
You can view Maximizer users within an organizational chart. As with organizational charts for Address Book entries, the hierarchy of the organizational chart shows users based on values in the Reports to field in the user properties. Organizational charts include disabled users along with all fully enabled Maximizer users.

➤ To view an organizational chart of Maximizer users

1. On the **Setup** tab, select **Manage Users** from the **User Management** group.
2. Click **Org Chart**.

The Organizational Chart dialog box opens displaying the chart for all Maximizer users.





CHAPTER 4

Maximizer Entries

Manage All Types of Information

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User-Defined Fields

User-defined fields are custom fields used to record additional information on Maximizer entries. You can set up different user-defined fields for the different types of entries in Maximizer. Each user-defined field can be associated with only one type of entry. You can create user-defined fields for the following types of entries:

- **Address Book –** Classifies Address Book entries. You can view these fields in the Address Book window or in an open Address Book entry.
- **Opportunities –** Classifies opportunities. You can view these fields in the Opportunities window or in an open opportunity.
- **Campaigns –** Classifies campaigns. You can view these fields in the Campaigns window or in an open campaign.
- **Customer Service –** Classifies customer service cases. You can view these fields in the Customer Service window or in an open customer service case.
- **Users –** Classifies Maximizer users. You can view these fields in the User Properties dialog box.

The following sections contain information on using user-defined fields:

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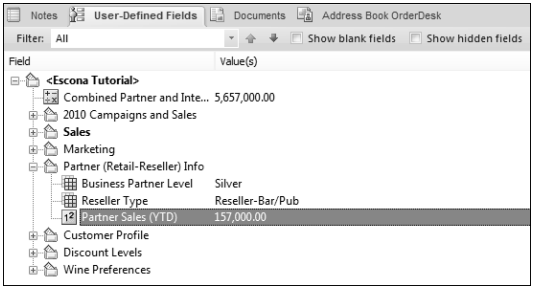
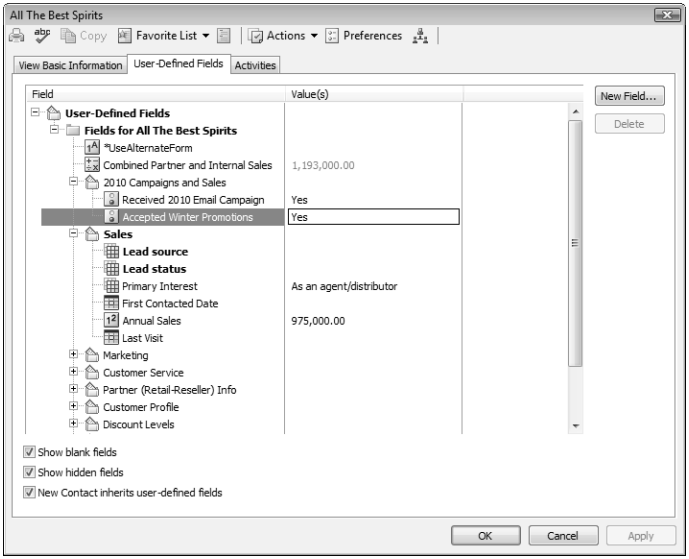
User-Defined Fields Following Window

User-defined fields for the current Address Book entry, opportunity, campaign, or customer service case are displayed in the User-Defined Fields following window. The following window displays only the user-defined fields for the type of entry, with values for the current entry. For example, when viewing Address Book entries, the User-Defined Fields following window contains only the user-defined fields for Address Book entries. The values of the fields are for the current Address Book entry in the controlling window.



User-Defined Fields Tab

You can access user-defined fields for open Address Book entries, opportunities, campaigns, and customer service cases from the User-Defined Fields tab of the dialog box for the entry. The folders and field names appear in a list on the left, and the field values appear on the right.



Types of User-Defined Fields

You can create different types of user-defined fields depending on the types of values required for the field. Maximizer defines the following types of user-defined fields:

- **Alphanumeric user-defined fields –** These fields record any alphanumeric text (letters and numbers) up to a specified maximum number of characters. You can encrypt alphanumeric fields for security protection. Note that you cannot disable or enable encryption once you have created the field.

Encrypted user-defined fields cannot be transferred, imported, or exported. They are also not searchable.

- **Date user-defined fields –** These fields store a specific date or an annually recurring date.
- **Formula user-defined fields –** These fields calculate values based on other basic or user-defined fields. You can set up these fields with formulas that create alphanumeric, date, or numeric values. Because they are calculated from values of other fields, values for formulas fields can be viewed in entries but cannot be set manually.

- **Numeric user-defined fields –** These fields record numeric values. You can specify a number of decimal places. For example, specify two decimal places to use this type of field for monetary values.
- **Table user-defined fields –** These fields enable you to select a value or values from a list. This type of field is very useful for multiple choice or multiple value fields. If you create a table user-defined field with the "single value only" attribute, only one value can be selected from the list.
- **Yes/no user-defined fields –** These fields record either yes or no values. Since the fields must contain one of these values, these user-defined fields are always mandatory.

Working with User-Defined Fields

Keep the following points in mind when working with user-defined fields:

1. By default, user-defined fields are displayed in a tree view, where fields are nested within folders. You can also display the fields in an alphabetical list, without their folder structure.

   You can set your default user-defined field view in your preferences. On the **Setup** tab, select **Preferences**, and select the **View User-defined fields in tree view** option in the System Defaults tab.

2. Double-click on a field to add or modify a user-defined field value.

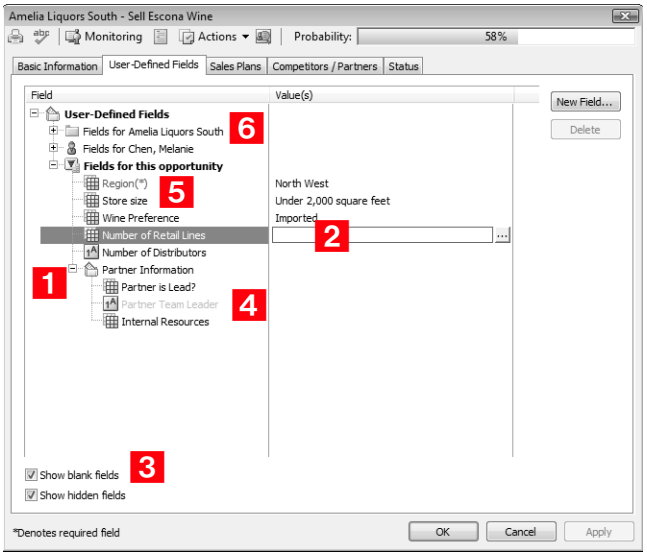
3. When you select the **Show blank fields** option, all user-defined fields in the Address Book for the type of entry are displayed, not only the fields with existing values.

4. When you select the **Show hidden fields** option, fields and folders that are set to hidden appear shaded. When you clear this option, the fields and folders are completely hidden.

5. Mandatory fields are denoted with an asterisk displayed after the field name and type. System-defined fields are shown in bold, black text.

6. Opportunities and customer service cases display the user-defined fields for the associated Address Book entries, as well as the user-defined fields for opportunities or cases.

Contacts display the user-defined fields for the associated Companies or Individuals, as well as the user-defined fields for Contacts.



Mandatory, System, and Key Fields

There are a number of types of fields in Maximizer. These fields display differently depending on some of their characteristics.

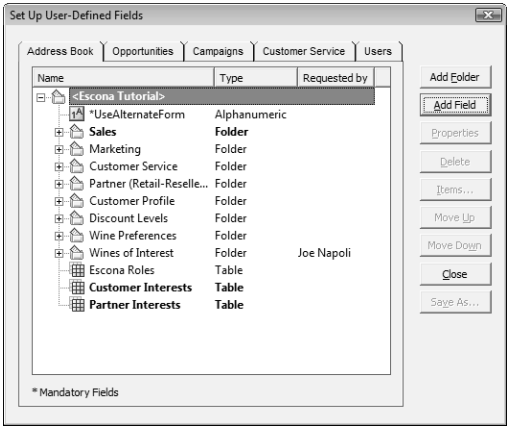
- **Mandatory Fields –** These fields must have values. System fields are set as mandatory in Administrator. User-defined fields are set as mandatory when creating the user-defined fields in the Set Up User-Defined Fields dialog box. Mandatory fields are denoted with an asterisk displayed after the field type.
- **System Fields –** These fields are created by default and are not user-defined. They cannot be deleted or modified, though the values of some of these fields can be modified in Administrator. Some fields in the User-Defined Fields tab are system fields. They are shown in bold, black text.
- **Key fields –** These user-defined fields are displayed in an entry's Basic Information tab. They are specified in the Key Fields preferences in Administrator. (Select File > Preferences, and select the Key Fields tab.)

Setting Up User-Defined Fields

User-defined fields are usually set up by your system administrator using Administrator. However, any user may be assigned permission to create, change, or delete user-defined fields in Maximizer.

User-defined fields are created and modified in the Set Up User-Defined Fields dialog box. You can access this dialog box from the Setup tab.

The dialog box contains five tabs, one for each category of user-defined field. The user-defined field structure can also be multi-tiered with multiple levels of user-defined field folders, each of which may contain other folders or user-defined fields. The folder structure may contain a maximum of three folder levels.



The following sections contain information on setting up user-defined fields:

- "Sorting User-Defined Fields" on page 64
- "Creating Folders for User-Defined Fields" on page 64
- "Creating User-Defined Fields" on page 65
- "Modifying User-Defined Fields" on page 66
- "Adding Items to Table User-Defined Fields" on page 67
- "Modifying Items in User-Defined Fields" on page 68

Sorting User-Defined Fields

The order that user-defined fields display in the Set Up User-Defined Fields dialog box determines the order that user-defined fields display for users.

Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons move fields only within their current folder level. You cannot use them to move items in or out of folders.

You can also use the mouse to drag and drop a field or a folder to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging it onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.

Creating Folders for User-Defined Fields

You can group similar user-defined fields into folders and subfolders to a maximum folder depth of three levels. Grouping user-defined fields into folders is particularly useful if you have a large number of user-defined fields. Grouping them makes them easier to find and reduces the amount of scrolling needed to find the one you are looking for.

➤ To create a folder for user-defined fields

1. On the **Setup** tab, select **User-Defined Fields**.

   – or –

   In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

   The Set Up User-Defined Fields dialog box opens.

2. Select the tab for the category of user-defined fields you want to work with.

3. To create a top-level folder, select the Address Book name at the top of the list.

   – or –

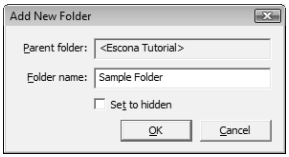
   To create a folder within an existing folder, select the existing folder.

4. Click **Add Folder**.

5. Enter a name for the new folder, and click **OK**.

User-defined field and folder names cannot contain forward slash or backward slash characters (/ \ ).

The new folder now appears in the Set Up User-Defined Fields dialog box.



If you set the folder to hidden, it is not displayed on the User-Defined Fields tab when you clear the Show hidden fields option.

6 Move the new folder to a different position in the list, if desired.

Creating User-Defined Fields

You can create user-defined fields for Address Book entries, opportunities, campaigns, customer service cases, and user accounts in the Set Up User-Defined Fields dialog box. This dialog box is available from the Setup tab in Maximizer or the File menu in Administrator. Users can create user-defined fields only if they have insert permission for User-defined field setup.

➤ To create a user-defined field

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

2 Select the tab for the category of user-defined fields you want to work with.

3 Select an existing folder, inside which you want to create a new field.

– or –

Select a user-defined field to create the new field at the same level as the selected field.

4 Click **Add Field**.

5 In the **Field Name** field, type a name for the user-defined field.

User-defined field and folder names cannot contain forward slash or backward slash characters (/ \ ).

6 From the **Type** drop-down list, select the type of user-defined field you want to add.

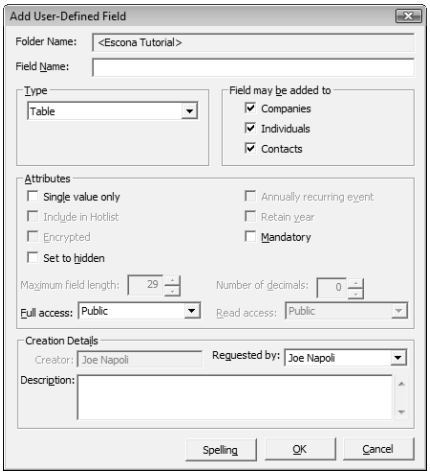
7 If you are adding a formula user-defined field, select the type of value the formula should return from the **Return type** drop-down list.

8 Specify the properties of the user-defined field.

For formula user-defined fields, click the ellipsis button next to the **Formula** field to specify the formula. Then, click **Insert Field** to add basic or user-defined fields to the formula.

9 Click **OK**.

The user-defined field is added to the list.



Modifying User-Defined Fields

You can change most properties of existing user-defined fields. However, you cannot change the type of user-defined field.

➤ To modify a user-defined field

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

2 Select the user-defined field and click **Properties**.

– or –

Double-click the alphanumeric, date, or numeric user-defined field.

3 Change the properties as required.

4 Click **OK** to save the changes.

Adding Items to Table User-Defined Fields

Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new user-defined field of this type, you should add the items to the table.

➤ To add items to a table user-defined field

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

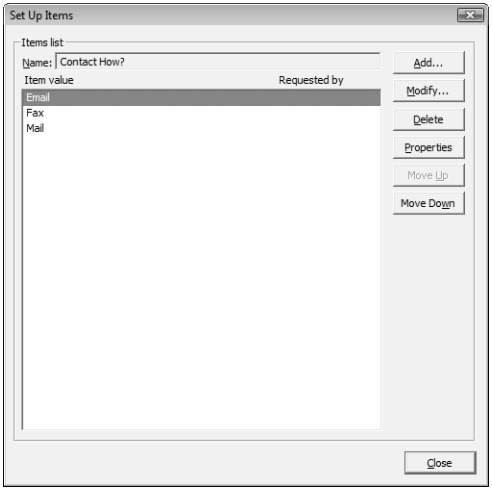
2 Select the table user-defined field, and click **Items**.

– or –

Double-click the table user-defined field.

The Set Up Items dialog box opens.

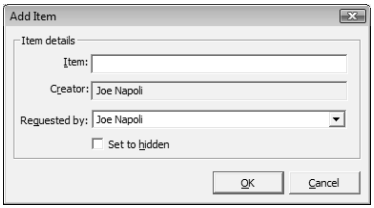
3 Click **Add**.



4 Type a name for the item, and specify the other properties of the item.

If you set the item to hidden, you can hide it from the Available Values list by clearing the Show hidden items option.

5 Click **OK**.



6 Repeat steps 3 to 5 to add any additional items to the table user-defined field.

Modifying Items in User-Defined Fields

You can change the properties of existing items in table or yes/no user-defined fields. For yes/no user-defined fields, you can specify one of the items as the default value that is automatically set for the field in all new entries.

➤ To modify an item in a user-defined field

1 On the **Setup** tab, select **User-Defined Fields**.

– or –

In the User-Defined Fields following window, right-click and select **Set Up User-Defined Fields**.

The Set Up User-Defined Fields dialog box opens.

2 Select the table or yes/no user-defined field, and click **Items**.

– or –

Double-click the table or yes/no user-defined field.

The Set Up Items dialog box opens.

3 Double-click the item you want to modify.

– or –

Select the item and click **Modify**.

4 Modify the properties of the item.

For yes/no user-defined fields, you can select **Default value** to set this item as the default value for the field.

5 Click **OK**.

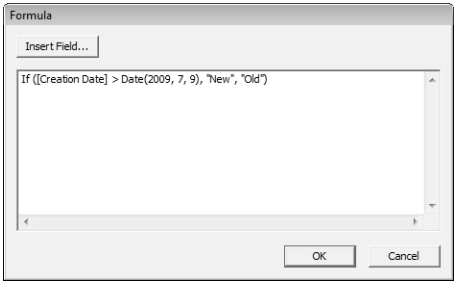
➤ To modify an item in a table user-defined field from the User-Defined Fields following window

1. Select the **User-Defined Fields** following window.
2. Double-click the table user-defined field that contains the item you want to modify.

   The Table Values dialog box opens.
3. Select the item you want to modify and click **Modify**.
4. Modify the properties of the item and click **OK**.

Formula User-Defined Fields

When you create a new or modify an existing formula user-defined field, you can click the ellipsis button next to the Formula field to specify the formula for the user-defined field. You can write the formula using existing basic and user-defined fields. Click the Insert Field button to select fields to add to the formula.



You can add arithmetic expressions to your formulas. You can also add functions and conditional expressions to create more complex formulas.

Formula user-defined fields can return alphanumeric, date, or numeric values. You specify the type of return value while creating the user-defined field. The functions available depend on the types of fields that you want to manipulate.

The following sections contain information on writing formulas for user-defined fields:

- "Arithmetic Expressions" on page 71
- "Alphanumeric Functions" on page 72
- "Date Functions" on page 76
- "Numeric Functions" on page 79
- "Conditional Expressions" on page 81

Arithmetic Expressions

You can create basic arithmetic expressions for formula user-defined fields using the basic arithmetic symbols. Multiple expressions can be combined to create complicated arithmetic formulas.

To write arithmetic expressions for formula user-defined fields, you can use the following symbols:

- **+** for addition.

  You can add any numeric values to each other, add integers to date values, and add alphanumeric fields or strings separated with quotation marks to each other.

- **-** for subtraction.

  You can subtract any numeric values from each other, and subtract date values from each other. Date values return integers representing the number of days between the dates.

- ***** for multiplication.

  You can multiple any numeric values together.

- **/** for division.

  You can divide any numeric values together

- **( )** for nested operations.

  You can use parentheses to create more complex operations on several numeric values.

Example: Numeric Values

Formula: ([Numeric field] + [Numeric field]) * [Numeric field]
Return value: Numeric

Example: Date Values

Formula: [Date 1] - [Date 2]
Return value: Numeric, the number of days between the two dates.

Example: Date and Numeric Values

Formula: [Date 1] + [Numeric field]
Return value: Date

Example: Alphanumeric Values

Formula: [FirstName] + " " + [LastName]
Return value: Alphanumeric, the two words listed together, separated by a space (FirstName LastName).

Alphanumeric Functions

Use alphanumeric functions to manipulate alphanumeric fields. When you use alphanumeric functions, you can insert alphanumeric fields as the parameters for the function or you can use any text strings. When you insert strings into functions, enclose the text of the string in quotation marks.

You can add the following functions to formulas using alphanumeric user-defined fields.

- **Len –** Returns the number of characters in a text string.
- **Mid –** Returns a specific number of characters from the text string starting at the position you specify.
- **Search –** Searches for text in a string and returns the position of the text.
- **Substitute –** Substitutes existing text with specified text.
- **Text –** Changes a numeric value to an alphanumeric text string. You can manipulate the returned string using any of the other alphanumeric functions.
- **Value –** Converts an alphanumeric value to a numeric value. Alphanumeric values beginning with alphabetical characters return a value of 0. You can manipulate the string using any of the numeric functions.

Len

Returns the length of a string.

Syntax

Len (Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string to return the length of.

Example

Len ([Company])

This example returns the number of characters in the company's name.

Mid

Returns a specific number of characters from a text string starting at a specified position.

Syntax

Mid (Alphanumeric, StartInt, LengthInt**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string that you want to search through. Normally, this would be a merge field.
StartInt	Integer	The position of the first character in the string you want to return.
LengthInt	Integer	(Optional) The length of the string you want to return.

Example

Mid("First Last", 7)

This example returns the text starting at the 7th position in the field. In this case, it returns "Last".

Search

Searches a string for text and returns the position of the text in the string.

Syntax

Search (SearchString, Alphanumeric, StartInt**)**

Parameters

Parameter	Data Type	Description
SearchString	String	The text to search for in the string.
Alphanumeric	String	The string to search through.
StartInt	Integer	(Optional) The starting character to search.

Example

Search ("Wine", [Company_Name])

This example searches for the text "Wine" in the company name and returns the place in the name where the text starts as an integer.

Substitute

Substitutes existing text with specified text. This function returns the entire string containing the new text.

Syntax

Substitute (Alphanumeric, OldText, NewText**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The string containing the text you want to change.
OldText	String	The text you want to change.
NewText	String	The text substituted into the string.

Example

Substitute([Address], "St", "Street")

This example returns the address with the abbreviation "St" substituted with the text "Street".

Text

Converts a numeric value to a string. You can then use the other alphanumeric functions to manipulate the returned string.

Syntax

Text (Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value that you want to convert.
DecPlace	Integer	(Optional) The number of decimal places to return.

Example

```
Text ([Revenue], 2)
```

This example returns the revenue as an alphanumeric string with two decimal places. If revenue, a numeric field, is 50000, the Text function in the above example returns 50000.00 as an alphanumeric value.

Value

Converts an alphanumeric value to a numeric value. If the value contains alphabetic characters, it returns 0. You can then manipulate the numeric value using any numeric functions.

Syntax

Value (Alphanumeric**)**

Parameters

Parameter	Data Type	Description
Alphanumeric	String	The alphanumeric string to convert.

Example

```
Value ([Contract Number])
```

This example returns the alphanumeric user-defined field, Contract Number, as a numeric value. If the field contains an alphabetical character, it returns 0.

Date Functions

Use date functions to manipulate date fields. When you use date functions, you can use date fields as the parameters for the function or you can supply date values for the functions. When you supply date values, use the Date function to format the values as dates.

You can add the following functions to formulas using date fields.

- **Date –** Converts integers to date values.
- **Day –** Returns the day of the month as an integer from a date value.
- **Dayofweek –** Returns the day of the week expressed as an integer.
- **Month –** Returns the month as an integer from a date value.
- **Year –** Returns the year as an integer from a date value.

Date

Converts integers to date values.

Syntax

Date (Year, Month, Day**)**

Parameters

Parameter	Data Type	Description
Year	Integer	The four-digit year.
Month	Integer	The one- or two-digit month.
Day	Integer	The one- or two-digit day.

Example

Date (2009, 7, 9)

This example returns July 9, 2009 as the date value.

Day

Returns the day of the month as an integer from a date value.

Syntax

Day(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date to return the day for.

Examples

Day(Date(2009, 7, 9))

This example returns 9 as the day of the month in the date value.

Day([Creation Date])

This example returns the day of the month that an entry was created.

Dayofweek

Returns the day of the week expressed as an integer for a specified date value, with 1 = Sunday, 2 = Monday, 3 = Tuesday, and so on.

Syntax

Dayofweek(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date value for which to return the day of the week.

Examples

Dayofweek(Date(2009, 7, 9)

This example returns 5, for Thursday, as the day of the week for the given date.

Dayofweek([Creation Date])

This example returns the day of the week that an entry was created.

Month

Returns the month as an integer from a date value.

Syntax

Month(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	The date from which to return the month.

Examples

Month(Date(2009, 7, 9))

This example returns 7, for July, as the month in the date value.

Month([Creation Date])

This example returns the month that an entry was created.

Year

Returns the year as an integer from a date value.

Syntax

Year(Date**)**

Parameters

Parameter	Data Type	Description
Date	Date	Date value for which to return the year.

Examples

Year(Date(2009, 7, 9))

This example returns 2009 as the year for the date value.

Year([Creation Date])

This example returns the year that an entry was created.

Numeric Functions

Use numeric functions to manipulate numeric fields. You can add the following functions to formulas using numeric fields.

- **Ceiling –** Rounds a number up to the nearest integer or up to a specified number of decimal points.
- **Floor –** Rounds a number down to the nearest integer or down to a specified number of decimal points.
- **Round –** Rounds a number to the nearest integer or to a specified number of decimal points.

Ceiling

Rounds a number up to the nearest integer or up to a specified number of decimal points.

Syntax

Ceiling (Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round up to.

Example

Ceiling(2.32, 1)

This example returns 2.4.

Floor

Rounds a number down to the nearest integer or down to a specified number of decimal points.

Syntax

Floor(Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round down to.

Example

Floor(2.36, 1)

This example returns 2.3

Round

Rounds a number to the nearest integer or to a specified number of decimal points.

Syntax

Round (Number, DecPlace**)**

Parameters

Parameter	Data Type	Description
Number	Decimal	The numeric value to round.
DecPlace	Integer	(Optional) The number of decimal places to round to.

Example

Round (2.45687, 2)

This example returns 2.46.

Conditional Expressions

You can create conditional expressions in your formula user-defined fields. Conditional expressions use the If expression to evaluate comparison statements and return values based on the results of the statements.

Conditional expressions use the following syntax:

If (Comparison Statement, True Value, False Value**)**

- **Comparison Statement –** Uses comparison operators to compare two values. It can be combined with logical operators (and, or, and not), as well as additional conditional expressions
- **True Value –** The value of the expression when the comparison statement is true. It can also be combined with other expressions.
- **False Value –** The value of the expression when the comparison statement is false. You can include other conditional statements to supply different answers for different values.

Comparison Statements

You can use symbols to create comparison statements for formula user-defined fields. You can compare any values including alphanumeric, date, and numeric values. Alphanumeric values are compared by checking the alphabetical order of the string.

You can create comparison statements with the following symbols.

- **==** to check that two values are equal to each other.
- **>** to check that the first value is greater than the next value.
- **<** to check that the first value is less than the next value.
- **>=** to check that the first value is greater than or equal to the second value.
- **<=** to check that the first value is less than or equal to the next value.

Comparison statements are often combined with logical operators to add multiple statements together. They're added to conditional expressions using If statements.

Logical Operators

You can use logical operators to help build comparison statements for your formula user-defined fields.

- **Or –** Combines two comparison statements where either one of the statements is true.
- **And –** Combines two comparison statements where both of the statements is true.
- **Not –** Negates a comparison statement.

Examples of Conditional Expressions

The following examples illustrate complex formula user-defined fields using conditional expressions.

Example 1

```
If ([Creation Date] > Date(2009, 7, 9), "New", "Old")
```

This example compares a date field with a constant date, using the Date function to format the date properly. The formula returns an alphanumeric value. If the date is later than the supplied date, the field has a value of "New". If the date is earlier than the supplied date, the field has a value of "Old".

Example 2

```
If (Dayofweek([Creation Date]) == 1, "Sunday",
    If (Dayofweek([Creation Date]) == 2, "Monday",
    If (Dayofweek([Creation Date]) == 3, "Tuesday",
    If (Dayofweek([Creation Date]) == 4, "Wednesday",
    If (Dayofweek([Creation Date]) == 5, "Thursday",
    If (Dayofweek([Creation Date]) == 6, "Friday",
    If (Dayofweek([Creation Date]) == 7, "Saturday", " ")))))))
```

This example uses the Dayofweek function to get the day of the week expressed as an integer value for a date field. It compares the value with integer values and outputs a string representing the day of the week in. If it does not have a value, it outputs an empty string.

Default Entries

You can set up default entries in the Address Book, Opportunities, and Customer Service windows. When you create new entries, fields specified in the default entry are already filled in for you. For example, if you know all your Address Book entries will have the same city and state, you can specify these fields in the default Address Book entry.

Default entries are user-specific, so each user in the Address Book can have different default entries.

➤ To modify a default entry

1. On the **Setup** tab, select **Default Entry** from the **Default Entry** group.

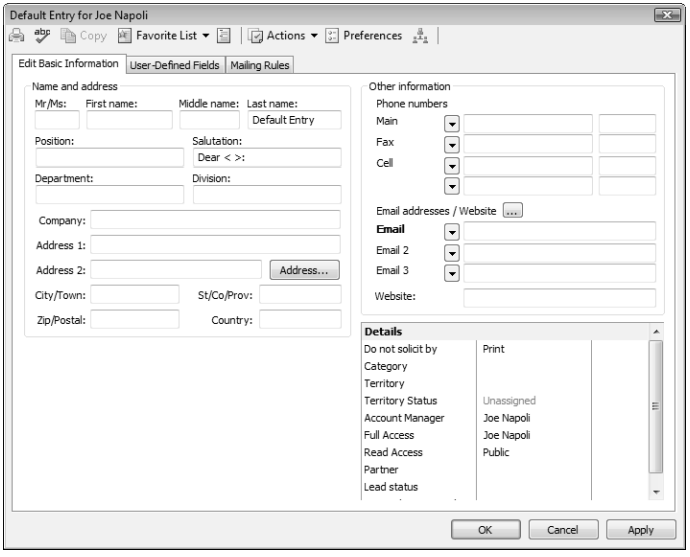
   The Default Entry dialog box opens.

2. Specify default values for fields in the **Basic Information** and **User-Defined Fields** tabs.

   For the opportunity default entry, you can also select the **Sales Plan** and **Competitors & Partners** tabs to specify more default fields.

   For the customer service case default entry, you can also select the **Solution Information & Billing** tab to specify more default fields.

3. Click **OK** to save the changes to the default entry.



Searching

Many of the actions you can perform with Address Book entries, customer service cases, campaigns, and opportunities apply to the entire list of entries in the active window. For instance, when you print a report from the Address Book window, you are generally given a choice between printing the selected entry (or entries) or printing the entire list. When you perform a mail merge, for instance, you generally use the entire current list.

Maximizer's search features let you search any field for the data you specify and modify your current list with the matching entries. If you wanted to create a list of Address Book entries in Washington State, for example, you would search the State/Province field for entries with "WA" in that field.

A search retrieves any entries that match the search criteria and that you have the rights to view.

The following sections contain additional information on searching for Maximizer entries:

- "Searching by Basic Fields" on page 84
- "Searching by All Fields" on page 85
- "Saving Searches in the Search Catalog" on page 88
- "Retrieving Saved Searches from the Search Catalog" on page 89
- "Undoing Searches" on page 90

Searching by Basic Fields

Maximizer makes it easy to search for entries by basic field, such as Last Name, Company, City/Town, or Email for Address Book entries or Status, Team Leader, or Revenue for opportunities. The items in the Search tab vary depending on what window is selected. You can search for entries matching a single field or multiple fields.

➤ To search for entries by a field

1. On the **Search** tab, select the field you are searching for from the **Search by** group.

   Select **Other** to see additional fields to search for.

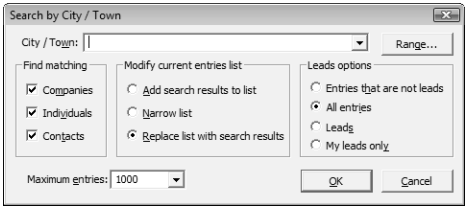
   For customer service cases, you can also select **Basic Fields** to search for entries matching multiple basic fields.

   The Search By [field] dialog box opens.

2. Specify the search criteria.

3. Select how you want to update the current list with your search results.
   - **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
   - **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
   - **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.
4. If applicable, specify the **Range** of the items to search.
5. Specify the **Maximum entries** to be returned in your search. This number is important to note because it affects what is displayed in your list after your search.
6. Click **OK** to run the search.

If you change the maximum entries field to a value less than the system default value, the value will remain as your default value for subsequent searches. If you change this field to a value more than the system default value, it will return to the system default value for subsequent searches. The default values for the number of entries returned in a search is set in Administrator.



Searching by All Fields

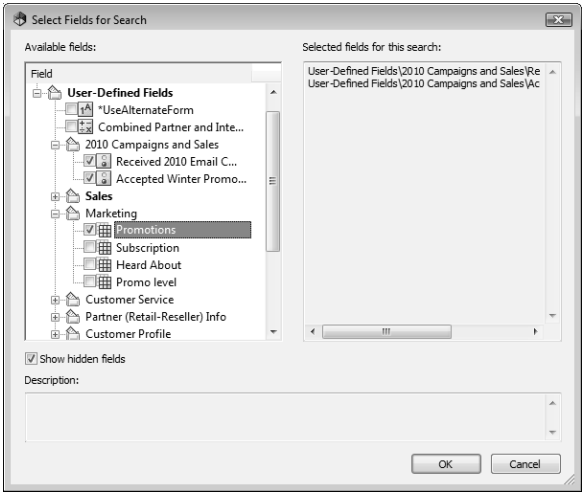
Maximizer's Search by All Fields feature is useful when you need to search by fields that are not listed in the Search tab or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search in the catalog for later use.

Use the Search by All Fields feature to find user-defined fields or a combination of user-defined fields and basic fields to produce a custom list of Address Book entries, opportunities, campaigns, and customer service cases.

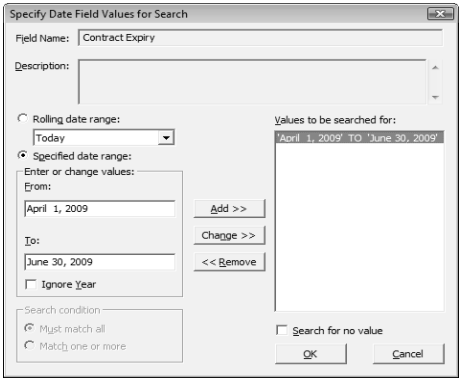
In the Opportunities or Customer Service window, you can search by Address Book entry fields, as well as opportunity or customer service fields. The search returns opportunities or customer service cases associated with the Address Book entries matching the field values.

➤ To search by all fields

1. On the **Search** tab, select **All Fields** from the **Search By** group.
   The Search by All Fields dialog box opens.
2. Click **Add.**
   The Select Fields for Search dialog box opens.
3. Select one or more fields and click **OK**.



4. For each field selected in the previous step, select or specify values in the dialog box that is provided.
   - For date fields, select **Rolling date range** to specify date values relative to the current date or select **Specified date range** to specify the exact values of the date.
   - For alphanumeric, date, and numeric fields, specify values in the **From** and **To** fields to return any values within the range.
   - If applicable, indicate under **Search conditions** whether to return entries that match all values, or that match one or more values.
   - Select the **Search for no value** checkbox to search for entries where no value is assigned to the selected field.



5 Specify the remaining search criteria in the Search by All Fields dialog box.

To build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the Not Equal button.

6 In the **Modify current entries list** area, select one of the options.

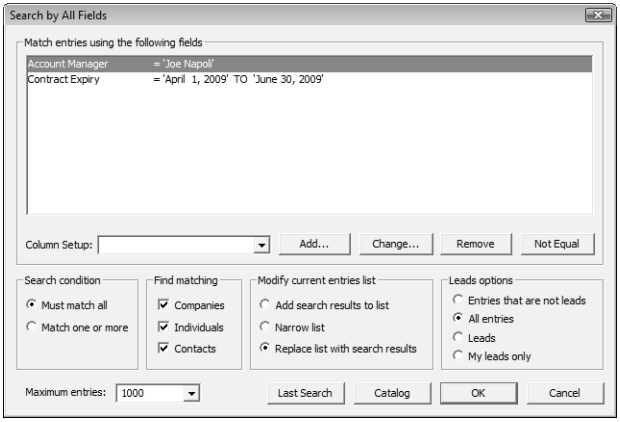
- **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
- **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
- **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.

You can choose to further narrow the search by specifying options to include or omit sales leads.

Use Last Search and Catalog for previously defined searches.

7 Specify the **Maximum entries** you would like to be returned.

8 Click **OK** to start the search.



Saving Searches in the Search Catalog

You can save values in the Search by All Fields dialog box to the search catalog to retrieve at a later time. While saving the search, you can select a column setup to display automatically whenever the search is retrieved.

While setting up the search criteria, you can specify generic values in your searches to make them reusable for different users and at different times. For fields that take Maximizer users as values, you can specify the current user as the value of the field. For date fields, you can specify values in relation to the current date, such as today, next month, and current fiscal quarter. Each time the search is run, values for the current user and values relative to the current date are retrieved.

➤ To save a search in the search catalog

1 On the **Search** tab, select **All Fields** from the **Search By** group.

2 Enter your search criteria in the Search by All Fields dialog box.

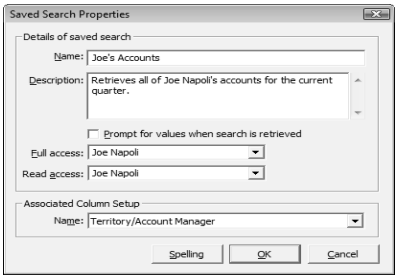
3 Click **Catalog** and click **Add**.

4 Specify the properties of the search.

- In the **Full Access** and **Read Access** fields, select a Maximizer user or group with access to the saved search.
- In the **Associated Column Setup** area, select an existing column setup to display when the search is retrieved.

5 Click **OK**.

The search is added to the search catalog.



Retrieving Saved Searches from the Search Catalog

You can quickly retrieve saved searches from the search catalog. You can retrieve a recent search directly from the Search tab. You can access other saved searches from the Search by All Fields dialog box. If the saved search has a column setup associated with it, the column setup is automatically displayed when the search is retrieved.

➤ To retrieve a recent search from the search catalog

- On the **Search** tab, select **Recent Catalog Searches** from the **Catalog** group, and select the name of the saved search.

➤ To retrieve a search from the search catalog

1 On the **Search** tab, select **All Fields** from the **Search By** group.

2 Click **Catalog**.

3 Select the saved search and click **Retrieve**.

The search criteria from the saved search is displayed in the Search by All Fields dialog box.

4 Click **OK** to run the search.

Undoing Searches

You can quickly undo the most recent search in the Address Book, Opportunities, and Customer Service windows.

➤ To undo the most recent search

- On the **Search** tab, select **Undo Search** from the **Options** group.

  The entries in the current list are replaced with the entries in the previous list.

Global Edits

You can update a number of entries at the same time with the Global Edit command. The changes are applied to all entries included in the global edit. You can either select the entries to apply the edits to or apply the edits to all entries in the current list.

When working with a global edit, keep the following points in mind:

- Specify values in most fields available for the type of entry you are working with.
- Specify **Remove** to remove values from basic and user-defined fields, leaving the fields blank.
- In the **Remove** column of a table user-defined field, select specific field values to remove from the field without removing all values.
- In the **Global Edit Rules** tab, specify how to add values to modified user-defined fields and some basic fields, such as category.
- In the **Note** tab, specify a note that is logged to all entries included in the global edit.

Global Edit is a very powerful feature, so you might consider backing up your Address Book before making significant changes. You can perform global edits on Address Book entries, opportunities, and customer service cases.

➤ To perform a global edit

1. Create a list of entries to modify.

   – or –

   In the current list, select the entries you want to modify.

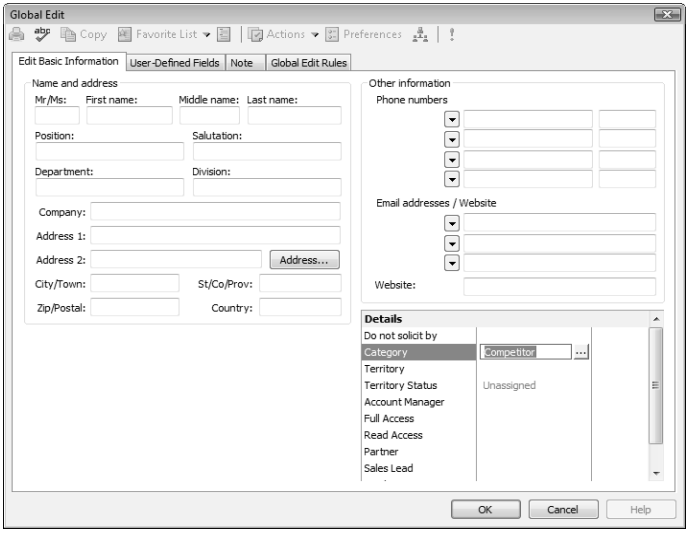
2. On the **Edit** tab, select **Global Edit** from the **Replace** group.

The Global Edit dialog box opens.

3 Apply your edits in the **Basic Information** and **User-Defined Fields** tabs.

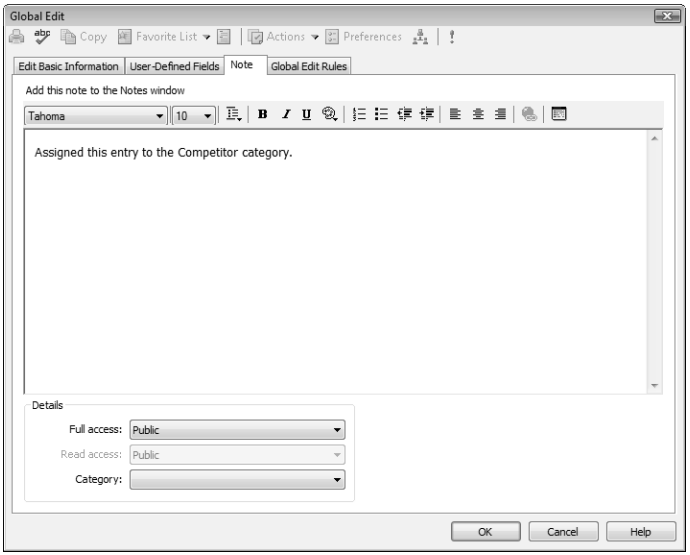
You can also apply changes to the **Sales Plans**, **Competitors/Partners**, and **Status** tabs in opportunities, and the **Solution Information & Billing** tab in customer service cases.

For many basic fields, you can select **Remove** to remove existing values for a field without specifying alternative values. For user-defined fields, use the **Remove** column to remove all values or specific values from a field.



4 Select the **Note** tab and add a description for the global edit.

The note is logged to all affected entries. You can also specify the Access Rights for the default note and a Category.



5 Select the **Global Edit Rules** tab.

6 If you are working with Address Book entries, set the mailing address options under **Mailing rules**.

You can specify **Do not change**, **Yes**, or **No** for each of the options.

- In the **Receives mail sent to Company or Individual** drop-down list, specify if you want to send mailings to the associated Contacts when sending mail to the Company or Individual.

  This option applies only to Contacts.

- In the **Use Address Book entry's name in mailing address** drop-down list, specify if you want to list the Address Book entry name as well as the Contact name (if applicable) in the mailing address.

7 Under **Update options**, specify how you want to use the current list.

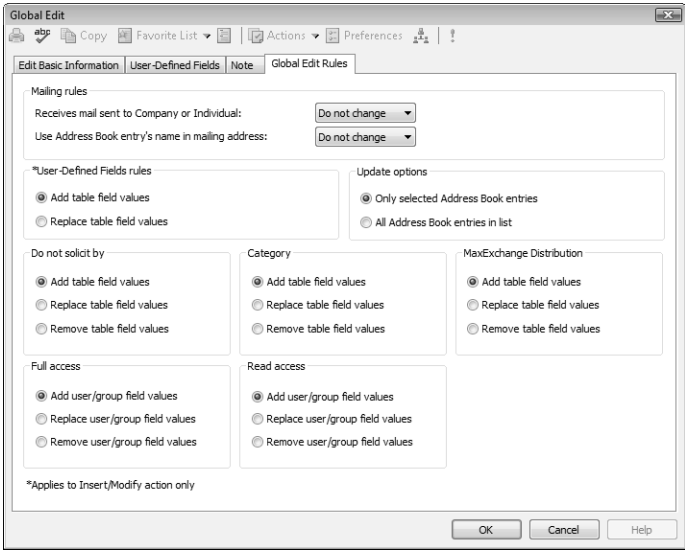
8 In the other sections of the Global Edit Rules tab, specify how you want the edits applied to specific basic fields and table user-defined fields.

- To add the selected values to the existing values, select **Add table field values** or **Add user/group field values**.

If the table user-defined field is "single-value only", the Add Table Field values option does not apply. The new value always replaces the existing one.

- To replace the existing values with the selected values, select **Replace table field values** or **Replace user/group field values**.
- To remove the selected values from the existing values, select **Remove table field values** or **Remove user/group field values**.

  This option is available only for specific basic fields. You can specify to remove table field values from user-defined fields in the **Remove** column of the User-Defined Fields tab.



9 Click **OK** to perform the global edit.

You are prompted with a message to verify that you want to continue with the operation.

Favorite Lists

Favorite Lists keep track of lists of Address Book entries, opportunities, and customer service cases. You can easily create new Favorite Lists and retrieve the lists at any time. You can also add and remove entries from existing Favorite Lists to keep track of changes to the list.

The following sections contain additional information on Favorite Lists:

- "Creating Favorite Lists" on page 94
- "Retrieving Favorite Lists" on page 96
- "Adding and Removing Entries in Favorite Lists" on page 96
- "Retrieving Favorite Lists" on page 96

Creating Favorite Lists

You can quickly create a new Favorite List from a list of entries in the Address Book, Opportunities, or Customer Service window. While creating the Favorite List, you can select a column setup to display automatically when the Favorite List is retrieved.

➤ To create a Favorite List

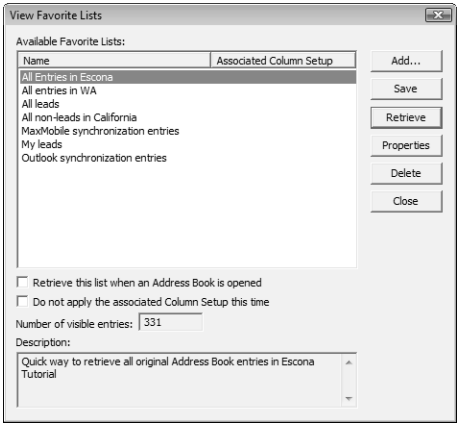
1. Create a list of the entries you want saved in the Favorite List.

   – or –

   From the current list, select the entries to save in the Favorite List.

2. On the **View** tab, select **All Lists** from the **Favorite Lists** group.

   The View Favorite Lists dialog box opens displaying all existing Favorite Lists.



3 Click **Add**.

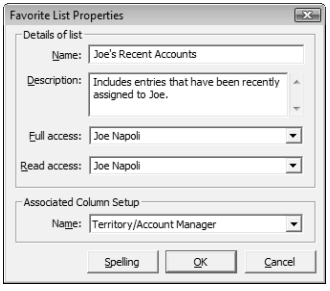
The Favorite List dialog box opens.

4 Specify the properties of the Favorite List.

- In the **Full Access** and **Read Access** fields, select a Maximizer user or security group with access to the Favorite List.

  If you select Public, all users can modify or retrieve the Favorite List. If you select a group or user, only members of that group or that particular user can perform these actions.

- In the **Associated Column Setup** area, select an existing column setup to display when the Favorite List is retrieved.



5 Click **OK**.

The new Favorite List is added to the list in the View Favorite Lists dialog box.

6 To set the Favorite List as the default Favorite List, select the **Retrieve this list when an Address Book is opened** option in the View Favorite Lists dialog box.

The default Favorite List is retrieved automatically when you first open the Address Book, Opportunities, or Customer Service window.

For Address Book entry Favorite Lists, this option overrides the "Ask at Address Book startup which list to view" setting in your preferences.

Retrieving Favorite Lists

You can quickly retrieve an existing Favorite List and replace the current list of entries with the entries in the Favorite List. If the Favorite List has a column setup associated with it, the column setup is automatically displayed when the Favorite List is retrieved.

You can retrieve Favorite Lists from the Address Book, Opportunities, and Customer Service windows.

➤ To retrieve a Favorite List

1. On the **View** tab, select **All Lists**, from the **Favorite Lists** group.

   – or –

   On the **View** tab, select **Recent Lists** from the **Favorite Lists** group, and select a Favorite List that you have recently accessed.

2. Select the Favorite List, and click **Retrieve**.

Adding and Removing Entries in Favorite Lists

You can add and remove entries from existing Favorite Lists at any time. You can select entries in the current list to add to or remove from the Favorite List, or you can add or remove an open entry.

➤ To add or remove entries in a Favorite List

1. In the Address Book, Opportunities, or Customer Service window, select the entries to add to or remove from the Favorite List.

   – or –

   Open an entry to add to or remove from the Favorite List.

2. On the **View** tab, select **Add to List** or **Remove from List** from the **Favorite Lists** group.

   – or –

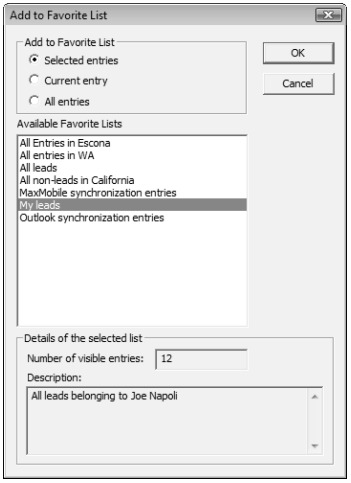
   In an open entry, select **Favorite List > Add to Favorite List** or **Remove from Favorite List**.

The Add to Favorite List or Remove from Favorite List dialog box opens.

3. Select the Favorite List and specify the details as to what entries you are adding or removing.

   For example, to add or remove only the selected entries in the current Address Book list, select Selected Entries.

4. Click **OK** to save the changes to the Favorite List.



Viewing Favorite Lists for Entries

You can view a list of the Favorite Lists to which the current Address Book entry, opportunity, or customer service case belongs.

➤ To view a list of Favorite Lists for an entry

1. Open the entry.
2. Select **Favorite List > View Favorite Lists**.

   The View Favorite Lists dialog box opens listing all the Favorite Lists that the current entry belongs to.

Column Setups

Maximizer provides a selection of column setups you can use for the Address Book, Opportunities, Campaigns, Customer Service, and Hotlist windows. You can also create your own column setups to display different fields in various combinations.

Column setups contain basic and user-defined fields specific for the type of entry displayed in the window. You can specify the fields displayed in each column of the window, as well as the width and heading of the columns.

In the Opportunities or Customer Service window, column setups can contain fields for Address Book entries, as well as for opportunities or cases. Columns with Address Book entry fields display values for the Company or Individual associated with the entry.

After creating a column setup, you can associate it with a saved search in the search catalog or with a Favorite List. The column setup is automatically displayed whenever the saved search or Favorite List is retrieved.

The following sections contain additional information on column setups:

- "Creating Column Setups" on page 98
- "Retrieving Column Setups" on page 100

Creating Column Setups

You can create custom column setups displaying any of the basic or user-defined fields in your list of entries. You can create column setups for the Address Book, Opportunities, Campaigns, Customer Service, and Hotlist windows.

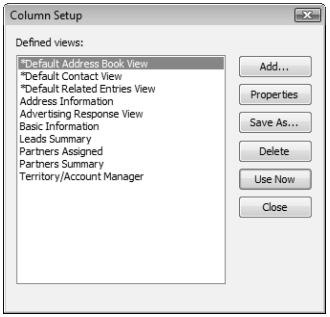
➤ To create a column setup

1. On the **Setup** tab, select **Column Setup** from the **Display** group.

   – or –

   On the **View** bar, click the **Column Setup** icon.

   The Column Setup dialog box opens.



2. Click **Add**.

   The Defined View Properties dialog box opens.

3. In the **Details of View** area, specify the basic properties of the column setup.

   - Enter a **Name** for the column setup.
   - Specify the access rights in the **Full Access** and **Read Access** drop-down lists.

     If you leave Public selected, all users can modify or retrieve the column setup. If you select a group or user, only members of that group or that particular user can perform these actions.

4. In the **Columns in View** area, click a column header.

5. In the **Available fields** list, click the plus symbol to expand a folder, select a field, and click **Add** to add the field to the selected column.

   You can repeat this step to add multiple fields to the selected column.

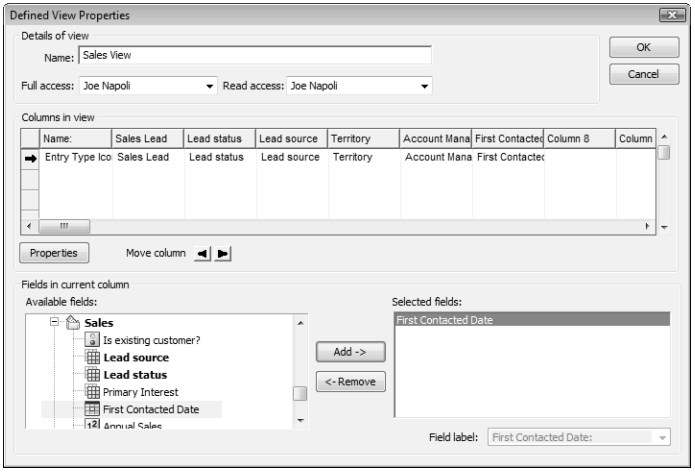
   Fields in the current column appear in display order in the Selected Fields list.

6. If you add multiple fields to the column, specify the field label for each field, or select field separator characters from the **Field Label** drop-down list to place multiple fields on the same line.

7. If necessary, click **Properties** and modify the heading and width of the column.

8. Repeat steps 4–7 for each column in the column setup.

9 Click **OK** to save the column setup.

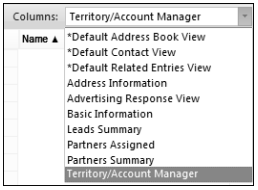


Retrieving Column Setups

You can retrieve existing column setups to change the fields displayed in the current window. In some windows, you can retrieve a column setup directly from the View bar. Otherwise, you can retrieve a column setup from the Column Setup dialog box.

➤ To retrieve a column setup

- In the **View** bar, select a column setup from the **Columns** drop-down list.



- On the **Setup** tab, select **Column Setups** from the **Display** group. Then, select the column setup, and click **Use Now**.

Coloring Rules

Coloring rules shade entries with different colors depending on the values of specific fields. You can set up coloring rules in the Address Book, Opportunities, Customer Service, and Hotlist windows. Each coloring rule includes a set of values for a specific field. You can choose a background color and a text color for each value in the rule. When you apply a coloring rule, the entries that have the same value for the field are colored even if the value is hidden in the current column setup.

You can also set up the color of current and selected entries. These colors override the coloring rules.

The following sections contain additional information on coloring rules:

- "Creating Coloring Rules" on page 101
- "Applying Coloring Rules" on page 103

Creating Coloring Rules

You can create coloring rules from the Address Book, Opportunities, Customer Service, and Hotlist windows.

➤ To create a coloring rule

1. On the **Setup** tab, select **Coloring Rule** from the **Display** group.
2. Click **Add**.

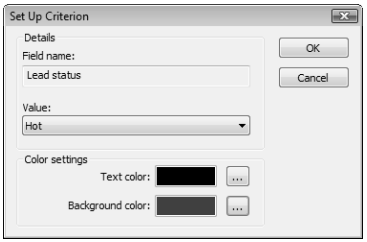
   The Rule Properties dialog box opens.
3. Enter a **name** for the coloring rule.

   You can also enter a **description** and specify values in the **Full access** and **Read access** fields.
4. Next to **Match entries using this field**, click the ellipsis button.
5. From the **Basic Fields** or **User Defined Fields** list, select the field for the rule, and click **OK**.
6. Click **Add**.

   The Set Up Criterion dialog box opens.
7. Select a **value** for the field, choose **text** and **background** colors, and click **OK**.

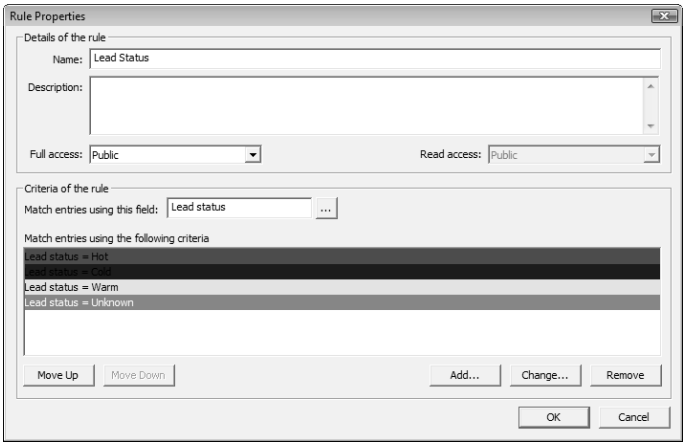
   In the Customer Service window, the text color of overdue cases is always red. To distinguish overdue cases from other cases,

choose text colors other than red for values in customer service cases.



8 Repeat steps 6–7 for other values of the field.

9 Click **OK** to save the coloring rule.



Applying Coloring Rules

You can apply any existing coloring rule to the current list in the Address Book, Opportunities, Customer Service, or Hotlist window.

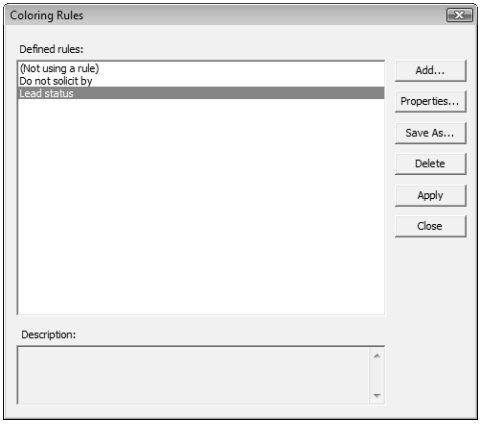
In the Customer Service window, the text color of overdue cases is always red, regardless of the text color assigned by the coloring rule. However, the background color of overdue cases matches the background color assigned by the coloring rule.

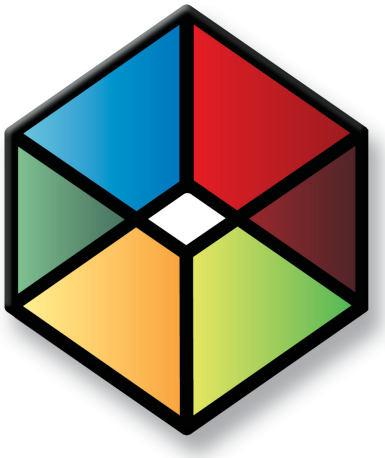
➤ To apply a coloring rule

1. On the **Setup** tab, select **Coloring Rule** from the **Display** group.

   The Coloring Rules dialog box opens.

2. Select an existing coloring rule, and click **Apply**.





CHAPTER 5

Notes and Documents

Store Notes and Documents in your Address Book

In this chapter...

"Notes" on page 106
"Journal" on page 110
"Documents" on page 112
"Maximizer Word Processor" on page 114
"Merge Fields" on page 118
"Microsoft Word and Corel Word Perfect Integrations" on page 121
"Company Library" on page 124

Notes

Notes are used to record activities associated with Address Book entries, customer service cases, campaigns, and opportunities. Use notes to jot down "manual" notes—your ideas and impressions about a customer, a case, a campaign, or an opportunity. You can enter manual notes for short company profiles or summaries of contracts and business agreements.

You can search for entries by notes. (On the Search tab, select Other Fields > Notes from the Search By group.) And you can view notes reports. (On the Reports tab, select Notes from the Associated Entries group.) Simply select the types of notes you want in your search or report.

The following sections contain additional information on working with notes in Maximizer:

- "Types of Notes" on page 106
- "Notes Window" on page 107
- "Adding Notes" on page 108
- "Default Notes" on page 109

Types of Notes

Maximizer automatically creates different types of notes, providing a history of all your activities. Maximizer creates the following types of notes:

By default, notes are logged for all of the main activities you can perform in Maximizer. You can adjust logging in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

- **Accounting –** Created when you create or modify accounting transactions using Accounting Link.
- **Customer Service –** Created when you add a customer service case.
- **Email –** Created when you send an email message to one or more Address Book entries. Email notes are also created when you send a campaign.
- **History –** Created when opportunities, cases, and campaigns are added or changed.
- **Incoming call –** Created when you receive a phone call.
- **Mail-outs –** Created when you print documents, labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Also created when campaign activities are sent out as email, fax documents, or printed documents.
- **Manual –** Added manually to entries.

- **Opportunity –** Created for Address Book entries when opportunities are added or changed. Opportunity notes can be printed or searched only from Address Book entries.
- **Other –** Third-party or custom notes created by your system administrator. Also, notes created by web access sites.
- **Outgoing call –** Created when you phone an Address Book entry.
- **Task –** Created when appointments or Hotlist tasks are scheduled, modified, deleted, or completed. For Hotlist task notes, the current owner of the Hotlist task is included in the note, even when a task is reassigned. For appointment notes, details of the appointment are included when the appointment is scheduled. And when an attendee list is modified, an additional note is logged.
- **Timed –** Created when you use the Timer
- **Transfer log –** Created when you transfer entries between Address Books.

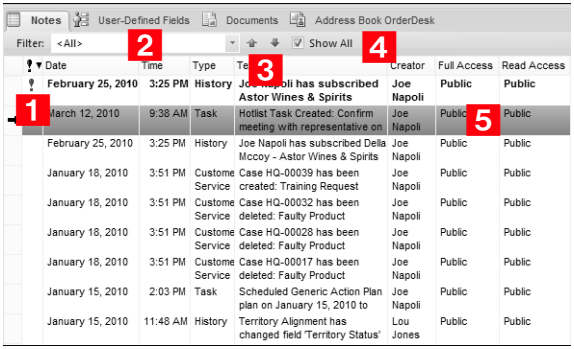
Notes Window

The Notes window is a following window, which means it displays notes only for the selected Address Book entry, customer service case, campaign, or opportunity.

Keep the following tips in mind when working in the Notes window:

1. Identify notes marked as important with the **Important** icon. By default, notes are sorted by the Important column, but you can sort by any column.
2. Use the **Filter** drop-down list to narrow the entries to a specific note type (for example, "Manual" or "Email"). Choosing **<Custom...>** enables you to search for notes that contain certain text, notes that were created by a particular user or accessible by a particular user or group, notes in a specific date range, and/or a combination of note types.
3. Use the up and down arrows to view the notes for the previous or next Address Book entry.
4. Use the **Show All** option to display all notes for the current Address Book entry. This includes notes belonging to the selected Company/Individual and all associated Contacts. If this checkbox is not enabled, only notes belonging to the Company/Individual or the selected Contact are displayed.

5 Double-click on an entry to view the entire note.


Notes
User-Defined Fields
Documents
Address Book OrderDesk
Filter: <All>
Show All
1
2
3
4
5
Date
Time
Type
Creator
Full Access
Read Access
February 25, 2010 3:25 PM History Joe Napoli has subscribed Astor Wines & Spirits Joe Napoli Public Public
March 12, 2010 9:38 AM Task Hotlist Task Created: Confirm meeting with representative on Joe Napoli Public Public
February 25, 2010 3:25 PM History Joe Napoli has subscribed Della Mccoy - Astor Wines & Spirits Joe Napoli Public Public
January 18, 2010 3:51 PM Customer Service Case HQ-00039 has been created: Training Request Joe Napoli Public Public
January 18, 2010 3:51 PM Customer Service Case HQ-00032 has been deleted: Faulty Product Joe Napoli Public Public
January 18, 2010 3:51 PM Customer Service Case HQ-00028 has been deleted: Faulty Product Joe Napoli Public Public
January 18, 2010 3:51 PM Customer Service Case HQ-00017 has been deleted: Faulty Product Joe Napoli Public Public
January 15, 2010 2:03 PM Task Scheduled Generic Action Plan plan on January 15, 2010 to Joe Napoli Public Public
January 15, 2010 11:48 AM History Territory Alignment has changed field 'Territory Status' Lou Jones Public Public

Adding Notes

When you add or edit a note, you can add formatting and hyperlinks in the note. You can also view and edit the HTML source of the note.

➤ To add a note

1 Select the entry to which you want to add the note.

Notes for the entry are displayed in the Notes following window.

2 Drag the entry to the **Notes** following window.

– or –

On the **Home** tab, select **Note** from the **Write** group.

– or –

In Notes following window, right-click and select **Add Note**.

– or –

In the Notes following window, double-click a blank note cell.

The Add Note dialog box opens.

ⓘ You can also add a note by copying text from the Windows Clipboard. In the Notes window, right-click and select Paste Link.

3 Enter the content of the note.

4 Use the options in the toolbar to format the note.

To view the HTML source of the note, select the **View Source/HTML** icon.

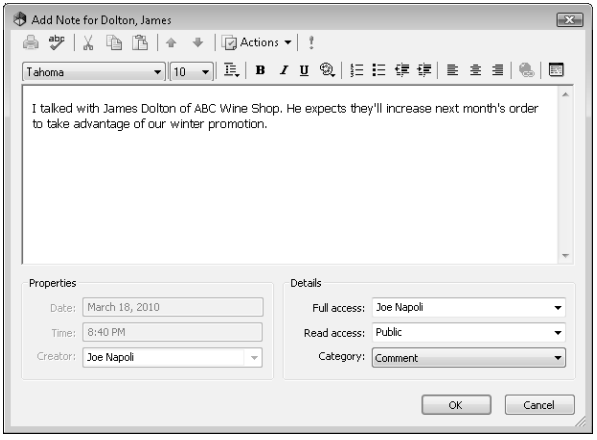
You can use the icons in the Menu bar to perform other tasks in the note. For example, you can click the Spelling icon to check the spelling in the note.

You can choose to always check spelling when saving changes in a dialog box in your preferences. (On the Setup tab, select Preferences.)

The Category field is available for only manual notes.

5 If necessary, select the **Important** icon to mark the note as important, and adjust the **Full access**, **Read access**, and **Category** fields in the note.

6 Click **OK**.



Default Notes

You can create default notes for different types of entries. Default notes are specific to the current user. The content of the default note automatically appears when you create a new note. The Full Access, Read Access, and Category fields can also have default values.

You can add default notes in the Address Book, Opportunities, Campaigns, Customer Service, and Journal windows.

➤ To add a default note

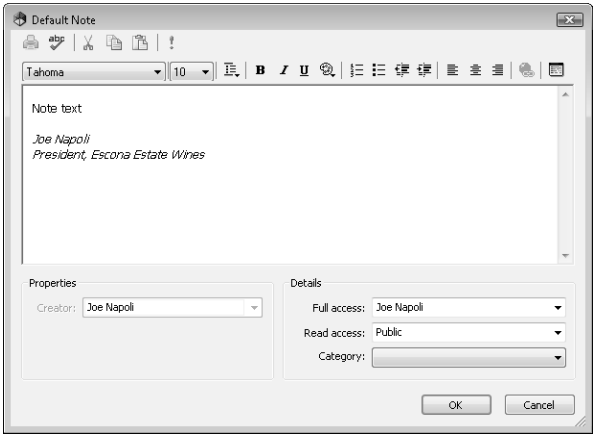
1 On the **Setup** tab, select **Default Note** from the **Default Entry** group.

The Default Note dialog box opens.

2 Enter the content of the note.

3 If necessary select a user or group for the **Full Access** and **Read Access** fields, as well as a note category.

4 Click **OK** to save the default note.



Journal

The journal provides you with a location to keep personal records. Journal entries can be business activities, reference notes, and personal ideas. These entries are similar to notes, except they are not attached to Address Book entries.

You can add journal entries up to 9,216 characters in length. By default, journal entries are stamped with today's date. You can change the date stamp if you want to add an entry for a past or future time period.

You can automatically log your Address Book activities as journal entries and search most Maximizer note types from the Journal window if you choose the Journal or Both options in your logging preferences.

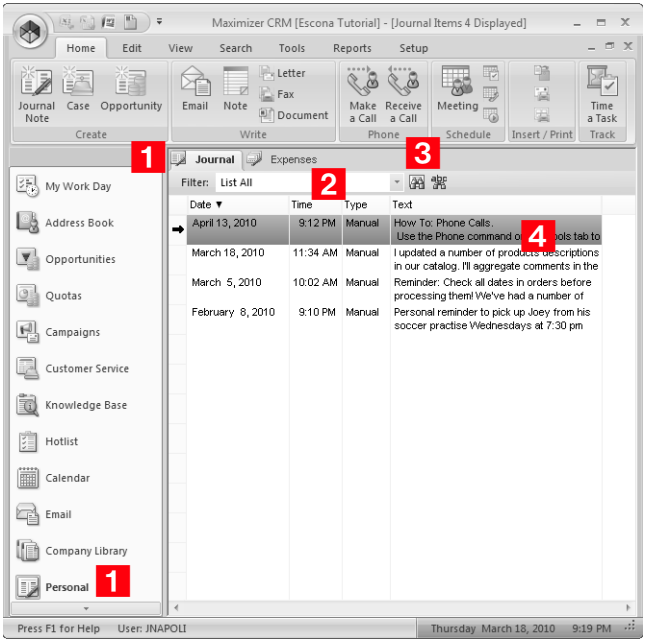
The following sections contain additional information on journal entries.

- "Journal Window" on page 111
- "Adding Journal Notes" on page 112

Journal Window

You can access the Journal window by selecting the Personal icon and clicking the Journal tab. You can also access the Expenses window from the Journal window. Keep the following points in mind while working in the Journal window:

1. Select the **Personal** icon, and select the **Journal** tab to open the Journal window.
2. Use the **Filter** drop down list and filter your journal entries displaying only entries in a specific date range—**List All**, **Today**, **Yesterday**, **This Week**, or **This Month**.
3. Select one of the search icons to search for a note by date or text.
4. Double-click on a journal note to open it and view its details.



Adding Journal Notes

You can add manual journal notes to the Journal window at any time. These notes are not attached to any entries and are accessible only to you.

➤ To add a Journal note

1. Select the **Personal** icon, and select the **Journal** tab to open the Journal window.
2. On the **Home** tab, select **Journal Note** from the **Create** group.

   – or –

   Right-click and select **Add Journal Note**.
3. Enter the text of the note, and click **OK**.

Documents

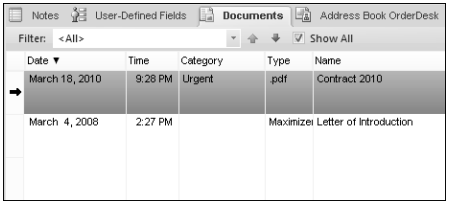
You can import into Maximizer files that are created in other applications. You can attach any files as documents to Address Book entries, opportunities, customer service cases, and campaigns. You can also save email messages to entries as documents directly from the Email window. The documents are stored with the entry to be accessed at any time.

The following sections contain additional information on working with documents in Maximizer:

- "Documents Window" on page 112
- "Viewing Documents" on page 113
- "Adding Documents" on page 113

Documents Window

You can view all of the documents attached to entries in the Documents following window.



Viewing Documents

You can view documents attached to entries from Maximizer. The file opens in the default application for the file extension of the document.

➤ To view a document

1. Select the entry to which the document is attached.
2. Select the **Documents** following window.

   All documents attached to the entry are displayed.
3. Double-click on the document that you want to open.

Adding Documents

You can add any type of files as documents in your Address Book entries, opportunities, customer service cases, and campaigns.

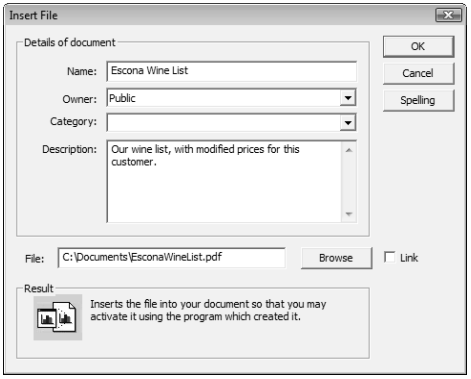
➤ To add a document to an entry

1. Select the entry to which you want to add the document.
2. Select the **Documents** following window.
3. On the **Home** tab, select **Insert File** from the **Insert/Print** group.

   – or –

   Right-click and select **Insert File**.
4. Specify properties for the document, such as **name**, **description**, and **owner**.
5. Click **Browse** and browse to the location of the file, and click **Open**.

6 Click **OK** to save the file with the entry.



Maximizer Word Processor

To create documents and templates, you can use the Maximizer Word Processor, which is always installed as part of Maximizer. You also have the option of using Microsoft Word or Corel WordPerfect as your word processor.

The Maximizer Word Processor is a separate application with a toolbar and menus that are similar to other commonly used word processors.

The word processor includes fax, invoice, letter, and memo templates. You can customize these templates or create your own custom templates.

➤ To open the Maximizer Word Processor

- Drag an Address Book entry to the **Documents** following window.
- On the **Home** tab, select **Letter**, **Fax**, or **Document** from the **Write** group.

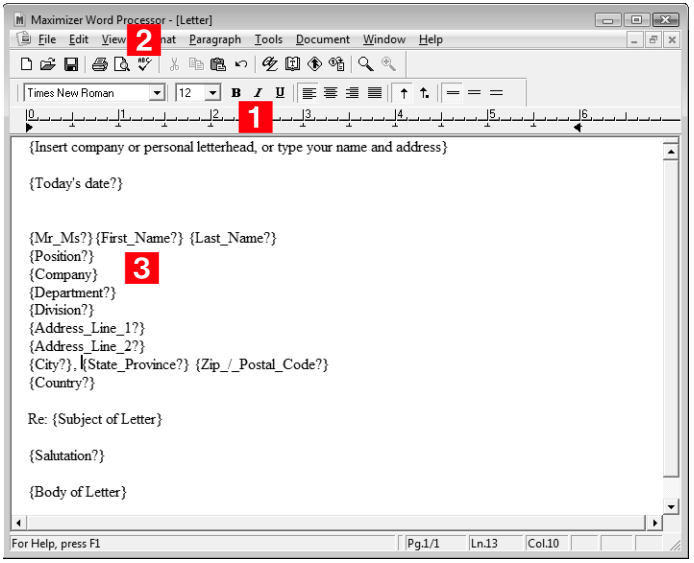
  The Maximizer Word Processor opens the template for the type of document selected.
- On the **Tools** tab, select **Maximizer Editor** from the **Other** group.
- Press F8.

Maximizer Word Processor Window

When you open the Maximizer Word Processor, it opens a separate window where you can create and edit documents and templates. Keep the following points in mind when working in the Maximizer Word Processor window:

1. Use the toolbars for common tasks and formatting text and paragraphs.
2. To run a spell check, place your cursor at the top of the document, and click the **Spell Check** button on the toolbar.
3. If your template has merge fields, the information for the selected Address Book entry—like the address—is inserted in place of the merge fields.

You can choose to always check spelling when saving changes in your preferences. (On the Setup tab, select Preferences.)



Documents and Templates

Understanding how templates and documents are used and how they communicate with each other is the key to working efficiently with this correspondence system.

Templates

A template is a standard design meant to be used repeatedly to create new documents. Templates are generally designed to be used with a company's stationery, including default page margins, standard fonts, and merge fields.

For example, a template might be used for the following:

- Create form letters for bulk mailings to clients and prospects.
- Provide a default structure for letters and faxes.
- Provide a consistent company image.

You can create a template in the Maximizer Word Processor by designing a document then selecting "Template" when you save your work. When you next create a new document, you can use your saved template as the basis for the document. You can also customize existing templates to suit your needs.

Documents

A Maximizer Word Processor document is always specific to an Address Book entry, customer service case, campaign, or opportunity. Typically, documents are created from one of the templates created with the word processor. A document can be a letter, a fax, a flyer, or anything you write with the word processor and send by mail, fax, or email.

Location of Templates and Documents

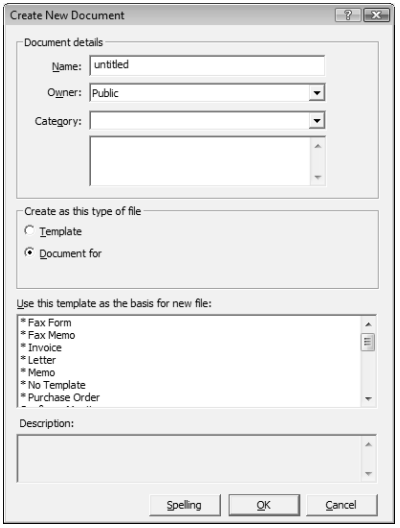
When you use the Maximizer Word Processor to save your templates and documents, they are automatically stored in the Microsoft SQL or Microsoft SQL Express database, not the Address Book folder. Therefore, they can be viewed only through the Maximizer Word Processor and not Windows Explorer or another file management tool.

Creating Documents

You can open the Maximizer Word Processor and create documents at any time while working with Maximizer. You can base the documents on existing templates, or you can start from a blank document. The document is attached to the currently selected Address Book entry.

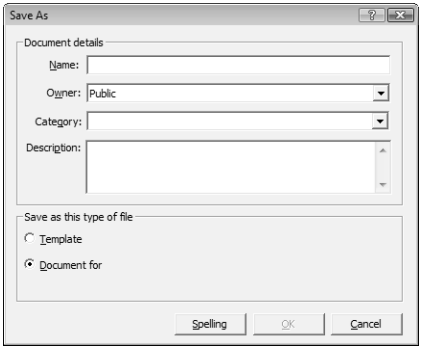
➤ To create a document

1. In Maximizer, select the entry that the document is associated with.
2. On the **Home** tab, select **Document** from the **Write** group.
3. Select the template to base the document on and click **OK**.



4. In the Maximizer Word Processor, modify the document as required.
5. Select **File > Save**.

6 Specify the properties of the document and click **OK**.



Merge Fields

Merge fields are simply place-holders in your document that can be replaced by basic Address Book entry or user-defined field information when you perform a merge. For example, in the body of a letter, you can insert a merge field for a Contact's name:

{First_Name?}

Ensure the start and end of the merge field reside on a single line. The start of a merge field is denoted by the left brace ({) character and the end of a merge field is denoted by the right brace (}) character.

When you perform the merge, the name of each recipient is displayed in place of the merge field. If the entry does not have an assigned value for the chosen merge field, the field does not display.

Merge fields are not restricted to Address Book entry information—you can insert merge fields for your own user information, opportunities, and customer service cases as well.

You can insert merge fields in email templates, email messages, Maximizer Word Processor templates, and Microsoft Word documents.

The following sections contain additional information on working with merge fields in Maximizer:

- "Inserting Merge Fields in the Maximizer Word Processor" on page 119
- "Mail Merge" on page 120

Inserting Merge Fields in the Maximizer Word Processor

You can insert merge fields into documents and templates in the Maximizer Word Processor, letting you add information for specific entries to generic documents and templates.

➤ To insert a merge field in the Maximizer Word Processor

1. In the Maximizer Word Processor, place your cursor where you want to insert a merge field.
2. Select **Tools > Merge Field**.

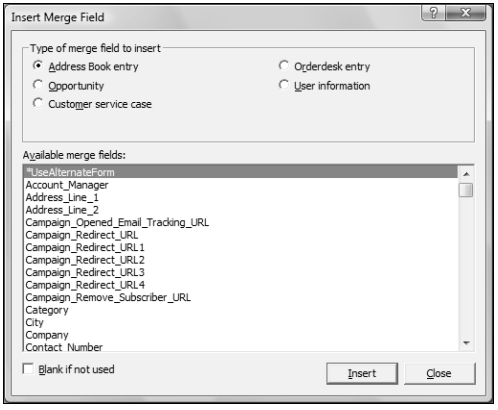
   – or –

   On the toolbar, click the **Merge Field** icon.

   The Insert Merge Field dialog box opens.
3. Select the type of merge field you would like to insert.
4. Select a merge field from the list and click **Insert**.
5. Select the **Blank if Not Used** checkbox if you prefer.

   During a mail-merge, this option leaves a blank space if there is no information available for a field. (By default, if there is no information in the field, the Maximizer Word Processor simply omits the field and leaves no space; it also adjusts the position of the other merge fields accordingly.)
6. Click **Insert**.

   The selected merge field is inserted in the template.



Mail Merge

Use mail merge in the Maximizer Word Processor to send a letter, an email message, or a fax to many recipients. The merge feature allows you to send a single document to multiple Address Book entries by fax, email, or regular mail. This type of merge is called a "broadcast" merge.

Because the word processor has merge fields for your Address Book information, you can create a document with a merge field in place of a specific name. These merge fields are replaced with the recipient's information when you perform the merge and send the document.

➤ To send a mail merge

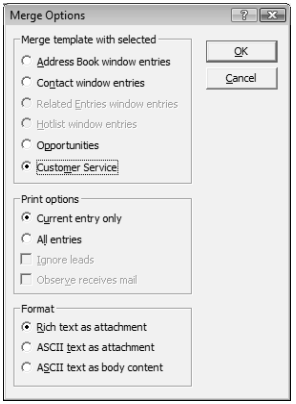
1. In Maximizer, create a list of Address Book entries that should receive your merged document.

   You can create a list by searching for the appropriate entries or simply selecting entries in your current list.

2. In the Maximizer Word Processor, select **File > Merge > to Printer**, **to Email**, or **to Microsoft Fax**.

3. Specify your merge options, and click OK to continue with the merge.

   Depending on what window you have active, the available merge entries vary



4. Select **Print** or **Send** to merge the document with the first entry in the list of entries, or select **Send All** or **Print All** to merge the document with all of your selected entries.

   Click **Skip** to go on to the next entry.

You can also send a mail merge from Microsoft Word or WordPerfect using the Maximizer toolbar embedded in the word processor to insert the merge fields.

Microsoft Word and Corel Word Perfect Integrations

You can use Microsoft Word or Corel Word Perfect as your word processor while working with Maximizer. With the integration, you can launch your word processor directly from your Address Book with a toolbar button in the custom toolbar.

Word or Word Perfect integration installs a Maximizer toolbar in the word processor. The options in the Maximizer toolbar integrate Address Book entries in Maximizer with the word processor.

The following sections contain additional information on working with Word Integration:

- "Inserting Merge Fields in Microsoft Word" on page 121
- "Sending Microsoft Word Documents" on page 122
- "Unlinking Merge Fields in Microsoft Word" on page 123

Inserting Merge Fields in Microsoft Word

You can insert merge fields into documents in Microsoft Word, letting you add information in your Address Book to your document.

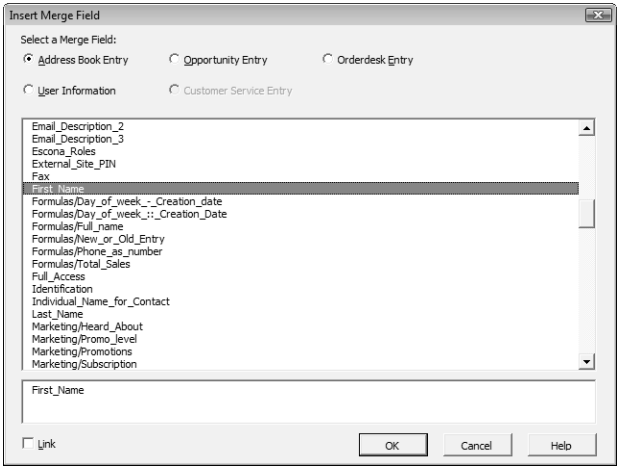
When you add merge fields to Word documents, you have the option of adding the merge field as a link. When the merge field is added as a link, the merge field syntax is added to the document. When you merge the document, the syntax is replaced with values for the current entry. If you add merge fields without linking them, the value of the merge field for the current entry is added to the document.

➤ To insert a merge field in a Word document

1. With a document open in Word, place your cursor where you want to insert the merge field.
2. From the **Maximizer** toolbar, select the **Insert Merge Field** icon.

   The Insert Merge Field dialog box opens.
3. In the top of the dialog box, select the type of merge field to insert.
4. Select a merge field from the list.
5. To add the merge field as a link, select the **Link** checkbox.

6 Click **OK** to finish adding the merge field to the document.



Sending Microsoft Word Documents

When you use Microsoft Word with Maximizer, you can send a Word document to the printer, fax, or email, automatically merging the document with one or multiple entries in Maximizer. When you send the document, you can choose to merge the document with the current entry, with all selected entries, or with all entries in the current list in Maximizer. You can also log a note to all entries included in the merge.

Word integration is available only in Microsoft Internet Explorer.

If you are sending the document to the printer or fax, the document is automatically sent to the printer or fax that is currently set up in Word.

If you are sending the document by mail, you can compose an email message to accompany the document.

➤ To send a Word document to the printer

1 Open the document in Word.

2 Create a list or select the entry or multiple entries in Maximizer.

3 From the **Maximizer** toolbar in Word, select **Send Document**.

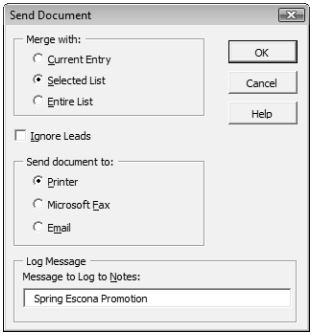
The Send Document dialog box opens.

4 Under **Merge with**, select how you want to use the current list.

- Select **Current Entry** to merge the document with only the current entry.

- Select **Selected List** to merge the document with all selected entries in the current list.
- Select **Entire List** to merge the document with all entries in the current list.

5. To filter the current list so that it does not include Address Book entries marked as sales leads, select the **Ignore Leads** option.
6. Under **Log Message**, enter a note to log with each of the selected entries.
7. Click **OK** to send the document to the current printer.



Unlinking Merge Fields in Microsoft Word

After inserting merge fields into Microsoft Word documents, the links between the Maximizer fields and the corresponding fields in the Word document are dynamic. The field values in the document change depending on the Address Book entry that is selected.

Dynamic links are created in the Word document only if the Link checkbox is selected in the Insert Merge Field dialog box.

If you do not want the document's merged values to change when a different Address Book entry is selected, you can break the merge field links and save the document with the information from the current entry.

➤ To break links to merge fields in Word

1. On the **Maximizer** toolbar in Word, click the **Break Links and Save** icon.
2. Browse to the location to save the document, and click **Save**.

Company Library

You know the value of keeping an organized database of your marketing materials and other company collateral. Brochures, price lists, photos, magazine reviews—all of these materials should be easy to find when you need them. The Company Library provides shared access to a central library of these materials with the security offered by the Maximizer environment.

If you use another word processor—such as Microsoft Word or Corel WordPerfect—for your correspondence, you can even open a document from the Company Library, merge it with one or more Address Book entries, and print or send it as an email message.

Most file types are supported in the Company Library if you have the associated application installed on your computer. These include the following file types:

- .DOC and .RTF files – Microsoft Word
- .XLS files – Microsoft Excel
- .PPT files – Microsoft PowerPoint
- .HTM and .HTML
- .BMP files – bitmaps
- .TXT files – text and Company Library notes
- .JPG, .GIF, and .TIF files – graphic files
- .PDF files – Adobe Portable Document Format files
- .MXD files – Maximizer Documents
- .MSG files – Outlook Email Messages

The following sections contain additional information on working with the Company Library:

- "Company Library Window" on page 125
- "Organizing the Company Library" on page 127
- "Adding Documents and Notes to the Company Library" on page 127
- "Sending Documents by Email from the Company Library" on page 129

Company Library Window

The Company Library window is divided into two areas: the left side is a tree view, which displays the folders and files in your library; the right side is a preview area, in which you see a preview of certain file types or type text notes.

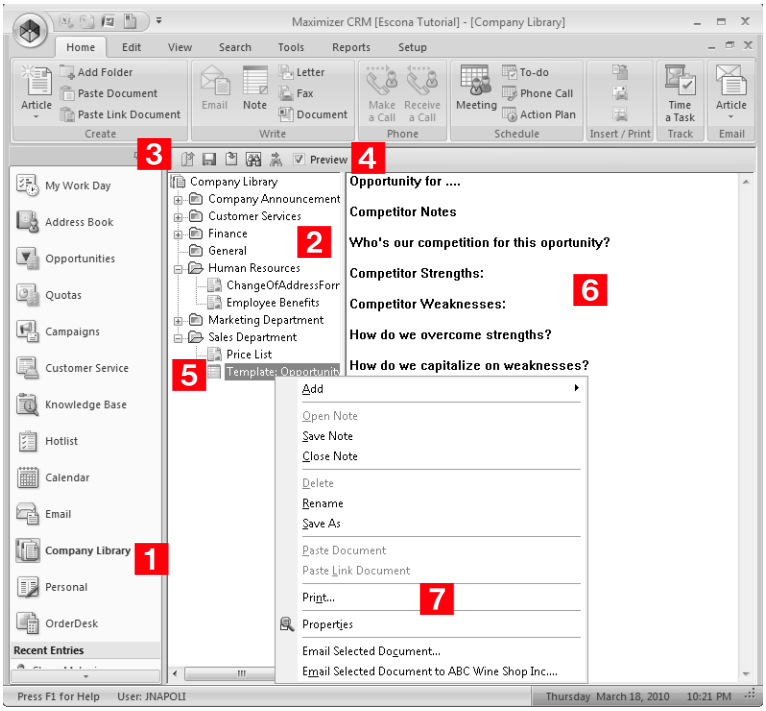
Keep the following points in mind when working in the Company Library window.

1. Select the **Company Library** icon to open the Company Library window.
2. In the area on the left side of the window, view your folders and files in a tree view.

   To view the contents of a folder, click the plus sign on the left side of the folder.
3. Use the toolbar for common tasks.
4. Select the **Preview** checkbox to display a preview of notes and most file types in the right part of the window.
5. Double-click on a document or note to open it.
6. Write new notes and edit existing notes in the pane on the right-side of the window.

7 Use the shortcut menu to perform common tasks in the window such as adding, deleting, or renaming files.

- Save files on your computer or a network location by right-clicking on the file and choosing **Save As**.
- Print documents and notes, by right-clicking and choosing **Print**.



Organizing the Company Library

The files in the Company Library are organized in a folder structure to help you keep track of your corporate documents and notes. Folders, documents, and notes are listed in alphabetical order in the Company Library. You can create new folders and move existing documents and notes to other folders to organize this structure.

You can drag documents and notes to other folders to move them. You can also drag folders to other folders to move the folder and all of its contents.

➤ To add a folder to the Company Library

1. In the Company Library window, click on the parent folder that you want to add the new folder to.

   – or –

   To add the folder at the root level, click the Company Library folder.

2. On the **Home** tab, select **Add Folder** from the **Create** group.

   – or –

   Right-click and select **Add > Folder**.

3. Enter the name for the new folder.

Adding Documents and Notes to the Company Library

The Company Library can store many different file types. Provided that your system administrator has given you access to the Company Library, you can add documents and notes as either private or public entries. If you add a document, you can browse for an existing file on your hard disk drive or network.

You can choose to either “link” or “embed” files in the Company Library. Embedding is usually a better choice, as a link is only a “shortcut” to the original file, which may get moved, renamed, or may not be accessible to all Maximizer users.

➤ To add a document to the Company Library

1. In the Company Library window, click on the folder to which you want to add the document.

2. On the **Home** tab, select **Article > Document** from the **Create** group.

   – or –

   Right-click, and select **Add > Document**.

The Insert File dialog box opens.

3. Click **Browse** to select a file.
4. Locate the file, and click **Open**.
5. Specify a **Name**, **Category** (optional), and **Owner** for the document.
6. Click **OK**.

➤ To add a note to the Company Library

1. In the Company Library window, click on the folder to which you want to add the note.
2. On the **Home** tab, select **Article > Note** from the **Create** group.

   – or –

   Right-click, and select **Add > Note**.
3. Enter a name for the note.
4. Click in the right pane of the window, and type the content of the note.
5. In the toolbar, click the **Save Note** icon.
6. To specify properties of the note, right-click and select **Properties**.
7. Specify a **Category** (optional), and **Owner** for the note.
8. Click **OK**.

Sending Documents by Email from the Company Library

You can send documents by email directly from the Company Library window. The Company Library documents are attached to the email message. You can select one or multiple documents and notes to attach to the email message.

You can send the documents to the currently selected Address Book entry, or you can select Address Book entries while sending the documents.

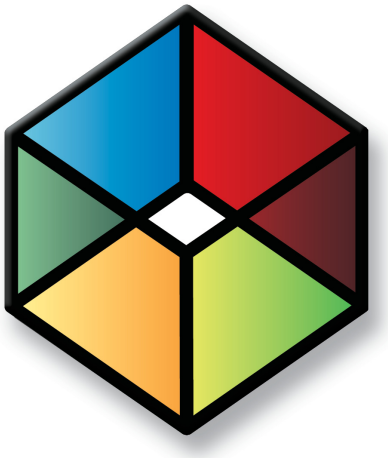
➤ To send documents by email from the Company Library

1. If you want to send the documents to an Address Book entry, in the Address Book window, select the Address Book entry to send the documents to.
2. In the Company Library window, select any documents and notes you want to send.

   You can hold down the Control key to select multiple documents and notes.
3. In the **Home** tab, select **Article** from the **Email** group, and select the name of the document.

   Depending on your email preferences, the Send Email dialog box may open with options for logging the email message with Address Book entries.

   If necessary, adjust the email options, and click **OK**.
4. Enter the details of your email message.
5. Click **Send**.



CHAPTER 6

Calendar and Hotlist

Track Your Appointments and Tasks

In this chapter...

"Hotlist Tasks" on page 132
"Calendar Appointments" on page 136
"Calendar and Hotlist Preferences" on page 143
"Action Plans" on page 144
"Viewing Activities for Entries" on page 148
"Peg Board" on page 149
"World Clock" on page 150

Hotlist Tasks

The Hotlist is a timeless "to-do" list of tasks and reminders. Tasks include calling and writing to customers. Use the Hotlist window to record actions and follow up on personal activities, such as producing expense reports, or those related to your interactions with Address Book entries. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Hotlist tasks can be associated with opportunities, campaigns, and customer service cases, as well as Address Book entries. When you schedule strategies for opportunities or templates for traditional campaigns, Hotlist tasks are created for all of the activities in the opportunities and campaigns. When you create new customer service cases, Hotlist tasks are created for the assigned users based on the follow-up deadlines of the cases.

The following sections contain information on working with Hotlist tasks:

- "Hotlist Window" on page 132
- "Viewing Hotlist Tasks" on page 133
- "Adding Hotlist Tasks" on page 134
- "Reassigning Hotlist Tasks" on page 135

Hotlist Window

You can view all of your Hotlist tasks in the Hotlist window. Because the Hotlist is a controlling window, the following windows update with information on the Address Book entry associated with the task. Keep the following points in mind when working in the Hotlist window.

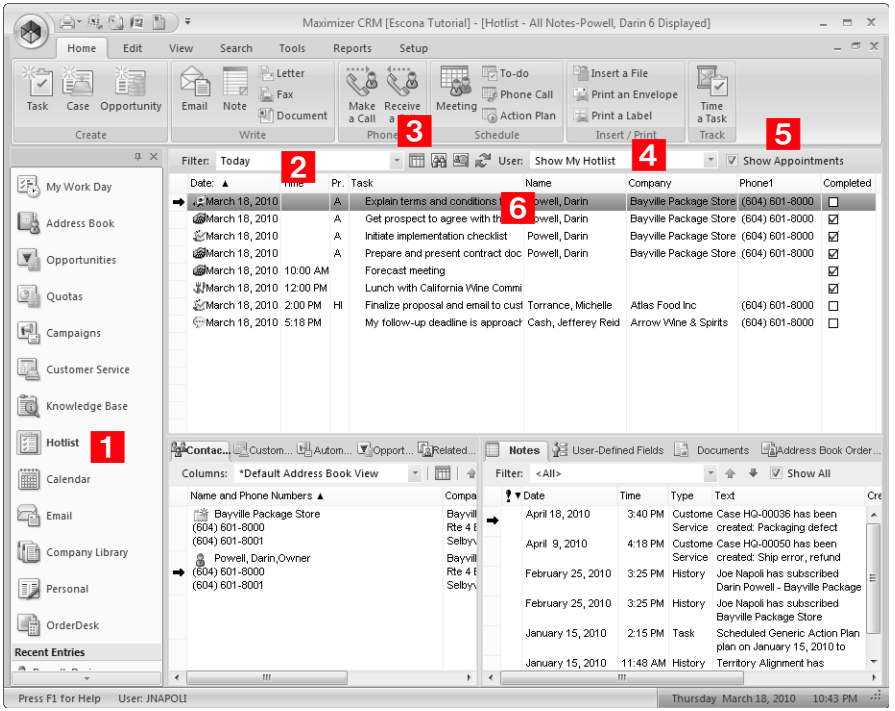
1. Select the **Hotlist** icon to open the Hotlist window.
2. Use the **Filter** drop-down list or click the **Build Hotlist** icon to select the date range you want to show.

On the View tab, select Carry Forward Unfinished Activities from the Filter group to view old tasks that are not yet complete in your current Hotlist.

3. Click the **Column Setup** icon to add or modify a column setup in the Hotlist window.
4. From the **User** drop-down list, select a Maximizer user to view another user's Hotlist.

   You must have access to other users' Hotlist to view their Hotlist tasks. You can give other users access to your Hotlist in your Calendar/Hotlist preferences.
5. Select **Show Appointments** to view your appointments in the list with your tasks.

6 Double-click on a task to view its details.



Viewing Hotlist Tasks

You can click on a Hotlist task in the Hotlist window to open the Hotlist Task dialog box where you can view and edit details of the task. Keep the following points in mind when working in the Hotlist Task dialog box.

1 Specify a **date** and, optionally, a **time** for the task.

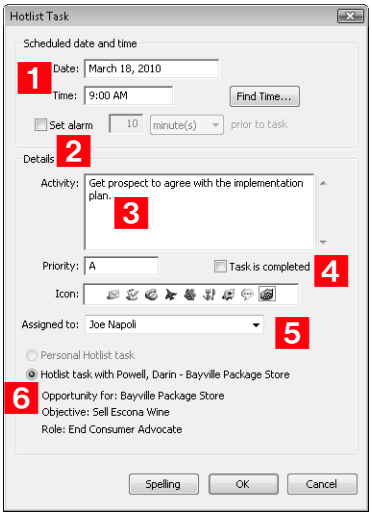
2 Select **Set alarm** to remind yourself of the task before the scheduled time.

3 Enter the **activity** or select a predefined activity from the drop-down list.

4 Mark the task as completed when you are finished with the task.

5 From the **Assigned to** drop-down list, select a user to assign the Hotlist task to another user.

6 Select **Personal Hotlist task** if you want to make the task personal and remove the Address Book entry associated with the task.



Adding Hotlist Tasks

You can create Hotlist tasks for Address Book entries, opportunities, and customer service cases. You can also create personal Hotlist tasks. Personal Hotlist tasks are not associated with Companies, Individuals, or Contacts.

➤ To add a Hotlist task

1 Select or open the entry associated with the task.

– or –

To add a personal task, select the **Hotlist** icon to open the Hotlist window.

2 In an open entry, select **Actions > Schedule a To-do**.

– or –

On the **Home** tab, select **To-do** from the **Schedule** group.

– or –

Right-click and select **Schedule > To-do**.

– or –

In the Hotlist window, on the **Home** tab, select **Task** from the **Create** group.

The Add Hotlist Task dialog box opens.

3. Enter the Hotlist task details.
4. Click **OK** to save the Hotlist task.

Reassigning Hotlist Tasks

You can reassign Hotlist tasks to different Maximizer users directly in the Hotlist window. You can reassign one or multiple Hotlist tasks at the same time.

➤ To reassign Hotlist tasks

1. In the Hotlist window, select the tasks you want to reassign.
2. On the **Edit** tab, select **Reassign** from the **Manage Activity** group.

   – or –

   Right-click, and select **Reassign**.

   The Reassign Hotlist Tasks dialog box opens.
3. Select a user and click **OK**.

Calendar Appointments

The Calendar lets you schedule meetings and appointments with other Maximizer users and Address Book entries. Calendar appointments can be associated with Address Book entries, opportunities, campaigns, and customer service cases, or they can be personal.

The following sections contain information on working with Calendar appointments:

- "Calendar Window" on page 136
- "Viewing Appointments" on page 139
- "Adding Appointments" on page 141

Calendar Window

You can view, add, and modify your appointments in the Calendar window. Appointments and Hotlist tasks are displayed in a daily, weekly, weekly list, or monthly view. All views allow you to see your appointments at a glance.

To assist you with scheduling, color bars and icons indicate the attendees and booked resources and locations for the appointment. You can display the appointments for other users if they have given you access to their calendars. Calendar access is set in your Calendar/Hotlist preferences.

Here are some tips for working with the Calendar window.

1. Select the **Calendar** icon to open the Calendar window.
2. In the top-left corner of the window, select the **arrow** buttons to navigate from day to day, week to week, or month to month.
3. Select the **Daily**, **Weekly**, **Weekly List**, or **Monthly** icon to change the calendar view.
4. View details of appointments directly in the Calendar window.
   - In the monthly view, hold your mouse pointer over a day to display all the appointment details for that day in a pop-up window. Then, hold your mouse over a particular appointment to view the appointment details. Or, click on the appointment in the pop-up window to open it.
   - In the weekly, weekly list, and daily views, hold your mouse over an appointment to display the appointment details. Double-click on an appointment to open it.
   - In the weekly list view, view appointment details directly in the calendar, where details such as start/end time and location are listed in an easy-to-view format.

5. Select the **Open Address Book entry** icon to view the Address Book entry associated with the selected appointment.

6. From the **User** drop-down list, select a user to display another user's appointments. You can also select a location or resource to view the booked time for meeting locations and resources.

7. Select **dates** in the miniature calendar view to navigate to different dates in the calendar. Use the arrow buttons to move between months or years.

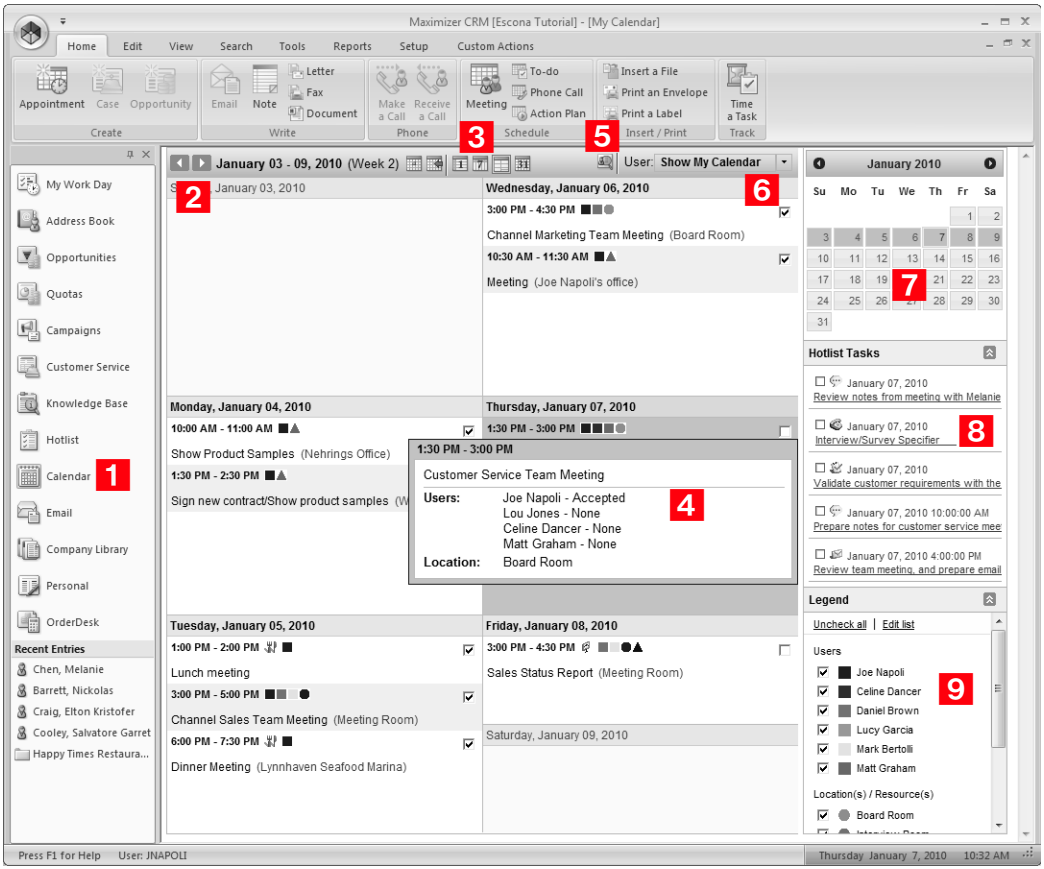
8. In the **Hotlist Tasks** section, view the day's Hotlist tasks.

   You can click on a Hotlist task to open it and view its details.

9. In the **Legend** section, select the checkbox beside other users and locations/resources to view the availability of users and locations/resources.

   You can use the **Check All** or **Uncheck All** icon to quickly select or clear all users and resources in the list. Use the **Edit List** icon

to add users and resources to the calendar and to set icon colors for these users and resources.



Viewing Appointments

Appointments for a day, week, or month, are displayed in the Calendar window. You can hold your mouse pointer directly over an appointment to see more information. You can also click on an appointment to open it and view its details.

When you open an appointment, its details are displayed in the Modify Appointment dialog box. Here are some tips for working in the Modify Appointment dialog box.

1. Click **Options** to set lead times for alarms and email reminders, to specify that email reminders be sent to Address Book entries, and to sign yourself out of the Peg Board.

   Default settings for alarms are specified in your Calendar/Hotlist preferences.

2. Click **Recurring** to view details of recurring appointments.

3. Select **Completed** to mark the appointment as completed.

4. View information on the **entry** associated with the appointment in the information bar.

   If the appointment is linked to an opportunity, a case, or a campaign, the entry is displayed as a link in the appointment. You can click the link to retrieve the entry in the associated controlling window.

   If the appointment is personal, you can link it with the current entry.

5. Specify the **date** and **time** of the appointment.

   If the end time of the appointment is earlier than the start time, the appointment spans into the next day.

   After clicking in one of the time fields, you can click the ellipsis button next to the field to view the availability of selected users, locations, and resources.

6. Select **Private** to keep the appointment details private.

   When this option is selected, even users with access to your calendar cannot see the appointment details. The appointment appears in the calendar with the subject displayed as “Private appointment”.

7. Select **Alarm** and **Reminder** to set an alarm and to send email reminders to yourself and to selected users.

   This generic message lists the basic appointment details; you cannot edit this message. This feature is available only if the Maximizer Email Service is running.

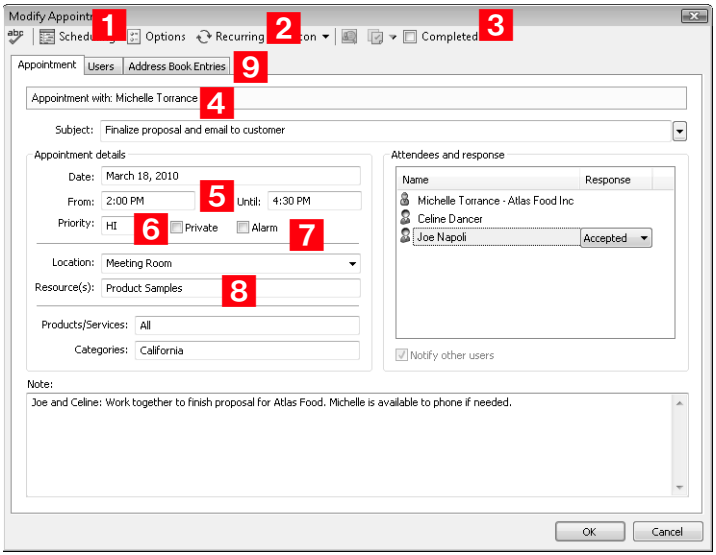
You can click Options to specify that email reminders are also sent to Address Book entries.

8 Select a **location** for the appointment and specify the needed **resources**.

These values are set in Administrator, but you can specify any value as a location.

9 Select the **Users** and **Address Book Entries** tabs to assign Maximizer users and Address Book entries to the appointment.

You can view the current users and Address Book entries assigned to the appointment in the **Attendees and response** list.



Adding Appointments

You can easily schedule an appointment with Address Book entries, other users, or yourself. The Add Appointment dialog box gathers all the information for the appointment—the date and time, the description, and who will be in attendance.

When scheduling appointments, you can set an alarm in advance of the appointment, mark yourself out of the Peg Board, set the priority, and send notifications to the selected users.

You can schedule appointments from the Address Book, Opportunities, Campaigns, Customer Service, or Calendar window. If you add an appointment from one of the main windows, the appointment is linked by default to the current entry. If you add an appointment from the Calendar window, it is by default created as a personal appointment.

➤ To add an appointment

1. In the Calendar window, select a day, and on the **Home** tab, select **Appointment** from the **Create** group.

   – or –

   In a main window, select an entry, and on the **Home** tab, select **Meeting** from the **Schedule** group.

   – or –

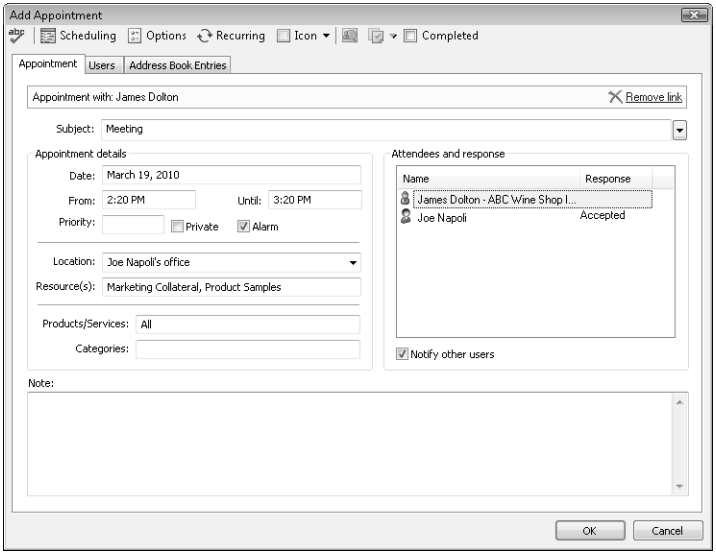
   In a main window, open an entry, and select **Actions > Schedule a Meeting.**

   – or –

   In the Address Book window, select an entry, right-click, and select **Schedule > Meeting**.

   The Add Appointment dialog box opens.

2. Specify the details of the appointment.



3. If necessary, select the **Users** and **Address Book Entries** tabs and add other Maximizer users or Address Book entries to the appointment.

   In the Appointment tab, you can select **Notify other users** to notify other attendees of the appointment and prompt them to select a response when they next open Maximizer.

4. Click **OK** to save the appointment.

   Depending on your Calendar/Hotlist preferences and the details of the appointment, you may be prompted to send an email message to the other users added to the appointment.

5. If necessary, customize the email notification, and click **Send**.

Calendar and Hotlist Preferences

Use the Calendar/Hotlist preferences to change your Hotlist task and calendar preferences. Most of the options on this tab apply to the calendar.

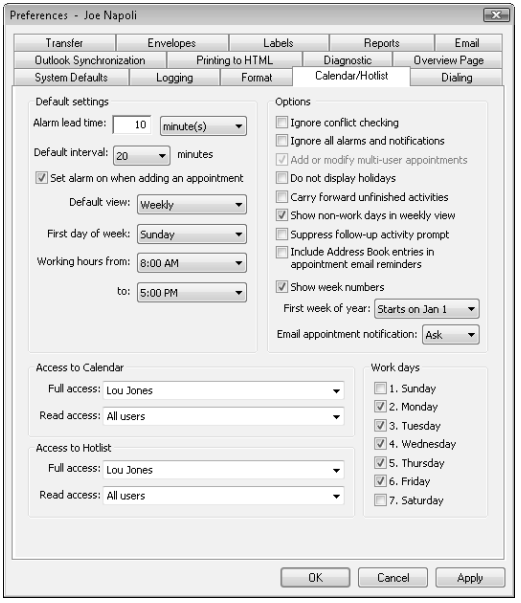
Hotlist and calendar preferences can also be controlled in Administrator using the user preferences

You can control which users can view or modify your tasks and appointments using the Full Access and Read Access options. For example, if you want a user or group to be able to view your tasks and appointments, select the name from the Read Access drop-down list. The selected user or members of the group can then view your tasks and appointments by selecting your user name from their Hotlist window View bar. If you want them to be able to add or modify your existing tasks and appointments, use the Full Access option.

The Full Access option also controls your ability to reassign tasks and appointments to other users, as you can only assign tasks and appointments to other users if they have given you permission.

➤ To set calendar and Hotlist task preferences

1. On the **Setup** tab, select **Preferences**, and select the **Calendar/Hotlist** tab.
2. Set your calendar and Hotlist default options, and click **OK** when you are finished.



Action Plans

Action Plans are lists of pre-determined appointments and Hotlist tasks that can be scheduled all at once. Each appointment or task is scheduled to occur a specified number of days before or after the Action Plan start date. Action Plans can be scheduled as personal appointments and tasks for Maximizer users or scheduled for Address Book entries, opportunities, customer service, and campaigns.

The following topics contain information on working with Action Plans:

- "Creating Action Plan Templates" on page 144
- "Scheduling Action Plans" on page 146

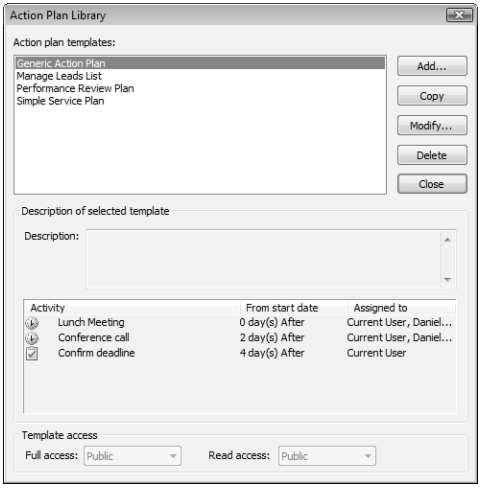
Creating Action Plan Templates

You can create Action Plan templates, which can later be scheduled to create appointments and Hotlist tasks for Maximizer users and for specific entries. You must have the corresponding permissions for the Action Plan Library as a user to create Action Plan templates.

➤ To create an Action Plan template

1. On the **Setup** tab, select **Template Library > Action Plan Library** from the **File Management** group.

   The Action Plan Library dialog box opens.



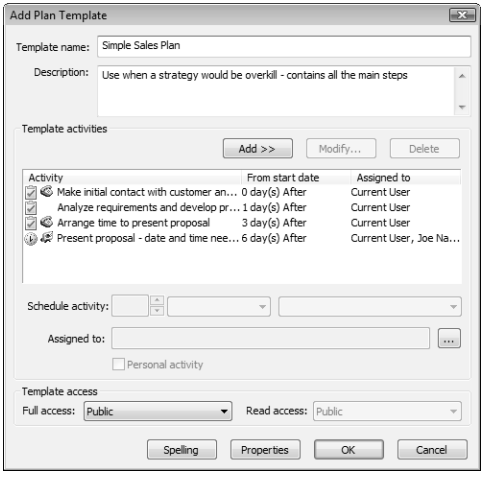
2. Click **Add**.

   The Add Plan Template dialog box opens.

3. Enter the template **name** and **description**.
4. Click **Add** and select **Appointment** or **Task** to add an activity in the template.
5. Enter the appointment or Hotlist task details.
   - In the **Schedule activity** fields, specify when to schedule the activity in relation to the start date of the Action Plan.
   - In the **Assigned to** field or the **Users** tab, select a Maximizer user (or multiple users in appointments) to assign to the activity.

     By default, the activity is assigned to the user who schedules the Action Plan.
   - Select the **Personal** or **Personal Hotlist task** option to mark the activity as personal, not associated with an Address Book entry.
6. Click **OK.**

   The activity is listed as part of the template.
7. Repeat steps 4–6 for each activity in the template.
8. In the **Full Access** and **Read Access** fields, select a user or group to make this Action Plan template accessible to only a particular user or group.
9. Click **OK** to save the Action Plan template.



Scheduling Action Plans

You can schedule Action Plans for Address Book entries, opportunities, campaigns, and customer service cases, as well as personal Actions Plans not associated with any entries. You can select a single entry or multiple entries. You can choose any existing Action Plan template for the Action Plan.

➤ To schedule an Action Plan for entries

1. Select or open the entry or entries to associate with the Action Plan.
2. In an open entry, select **Actions > Schedule an Action Plan**.

   – or –

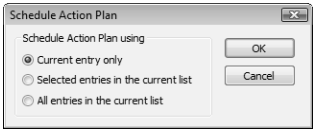
   On the **Home** tab, select **Action Plan** from the **Schedule** group.

   – or –

   Right-click and select **Schedule > Action Plan** or **Schedule an Action Plan**.
3. If necessary, select how you want to use the current list.

   You can schedule the Action Plan with only the current entry, with all selected entries, or with all entries in the current list.

   If no entries are selected, the Action Plan is automatically scheduled with the current entry.



4. From the **Plan template** drop-down list, select an existing Action Plan template.

   Details of the selected template are displayed. Optionally, you can modify the plan name and description.
5. In the **Start plan on** field, specify the start date of the Action Plan.

   You can click inside the field and then click the arrow button to choose a date from a pop-up calendar.
6. If necessary, click **Advanced** to toggle between the advanced and simplified view of the dialog box.
7. In the **Replace current user with** drop-down list, select the user to schedule the main Action Plan activities for.

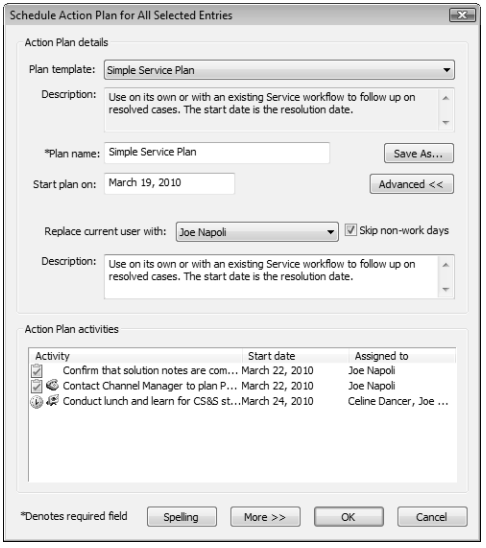
All template activities assigned to the current user are scheduled for the selected user. Template activities assigned for specific users continue to be scheduled for the users specified in the template.

You can also assign specific appointments and tasks to other users by editing the details of the appointment or task.

8 If necessary, click **More** to modify or add activities to the Action Plan.

You can click **Save As** to save a modified Action Plan as a new template.

9 Click **OK** to finish scheduling the Action Plan for the selected entries.


Schedule Action Plan for All Selected Entries
Action Plan details
Plan template:
Simple Service Plan
Description:
Use on its own or with an existing Service workflow to follow up on resolved cases. The start date is the resolution date.
*Plan name:
Simple Service Plan
Save As...
Start plan on:
March 19, 2010
Advanced <<
Replace current user with:
Joe Napoli
Skip non-work days
Description:
Use on its own or with an existing Service workflow to follow up on resolved cases. The start date is the resolution date.
Action Plan activities
Activity
Start date
Assigned to
Confirm that solution notes are com...
March 22, 2010
Joe Napoli
Contact Channel Manager to plan P...
March 22, 2010
Joe Napoli
Conduct lunch and learn for CS&S st...
March 24, 2010
Celine Dancer, Joe ...
*Denotes required field
Spelling
More >>
OK
Cancel

Viewing Activities for Entries

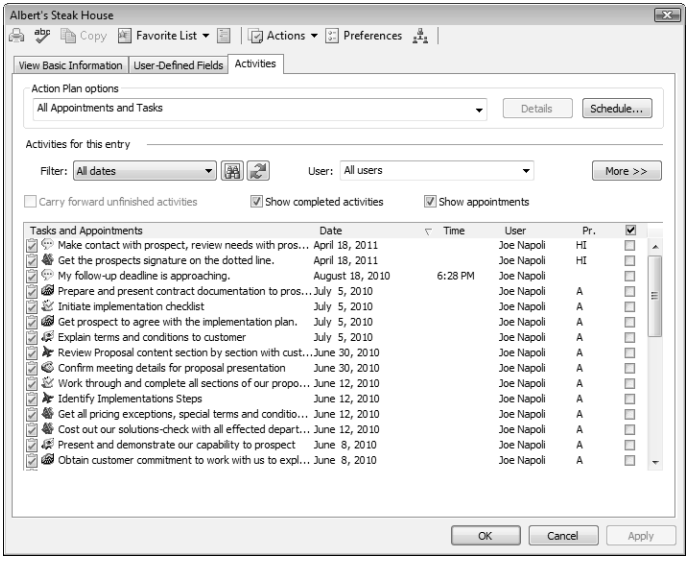
You can access all appointments and Hotlist tasks scheduled for specific entries directly in open entries. Appointments and tasks are displayed in the Activities tab for Address Book entries and customer service cases, in the Sales Plans tab for opportunities, and in the Marketing Plans tab for campaigns. If activities are scheduled for opportunities and customer service cases, they are also listed in the associated Address Book entries. You can also add and modify activities directly in entries.

➤ To view activities scheduled for an entry

1. Open the entry.
2. Select the **Activities**, **Sales Plans**, or **Marketing Plans** tab.
3. If necessary, select **Show activities**.
4. Optionally, select **Show appointments** or **Show completed activities** to view more activities scheduled for the entry.

   You can also filter the activities displayed for the entry. You can choose to view only Action Plan activities. And you can filter activities by date and user.

   To add, modify, or delete activities for the entry, click **More**.


Albert's Steak House
Copy
Favorite List
Actions
Preferences
View Basic Information
User-Defined Fields
Activities
Action Plan options
All Appointments and Tasks
Details
Schedule...
Activities for this entry
Filter:
All dates
User:
All users
More >>
Carry forward unfinished activities
Show completed activities
Show appointments
Tasks and Appointments
Date
Time
User
Pr.
Make contact with prospect, review needs with pros... April 18, 2011 Joe Napoli HI
Get the prospects signature on the dotted line. April 18, 2011 Joe Napoli HI
My follow-up deadline is approaching. August 18, 2010 6:28 PM Joe Napoli
Prepare and present contract documentation to pros... July 5, 2010 Joe Napoli A
Initiate implementation checklist July 5, 2010 Joe Napoli A
Get prospect to agree with the implementation plan. July 5, 2010 Joe Napoli A
Explain terms and conditions to customer July 5, 2010 Joe Napoli A
Review Proposal content section by section with cust... June 30, 2010 Joe Napoli A
Confirm meeting details for proposal presentation June 30, 2010 Joe Napoli A
Work through and complete all sections of our propo... June 12, 2010 Joe Napoli A
Identify Implementations Steps June 12, 2010 Joe Napoli A
Get all pricing exceptions, special terms and conditio... June 12, 2010 Joe Napoli A
Cost out our solutions-check with all effected depart... June 12, 2010 Joe Napoli A
Present and demonstrate our capability to prospect June 8, 2010 Joe Napoli A
Obtain customer commitment to work with us to expl... June 8, 2010 Joe Napoli A
OK
Cancel
Apply

Peg Board

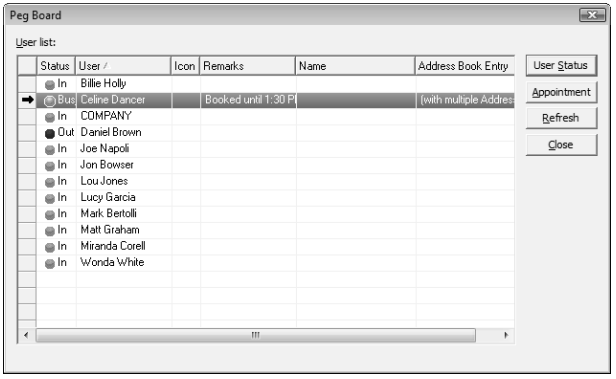
In a medium to large office, it's not always obvious when people are in, out, or busy with an appointment. The Peg Board works with Maximizer's calendar to show you each user's current status.

When users create appointment, they can automatically sign out of the Peg Board during the appointment. The Peg Board displays users that are currently available. You can also override the calendar status, and change your status directly in the Peg Board.

You can see other users' busy periods in the Peg Board if they have allowed you to view their calendars in the Calendar/Hotlist preferences. If you have permission to view users' calendar appointments, you can also click the Appointment button to view appointment details.

➤ To view the Peg Board

- On the **View** tab, select **Pegboard** from the **Availability** group.



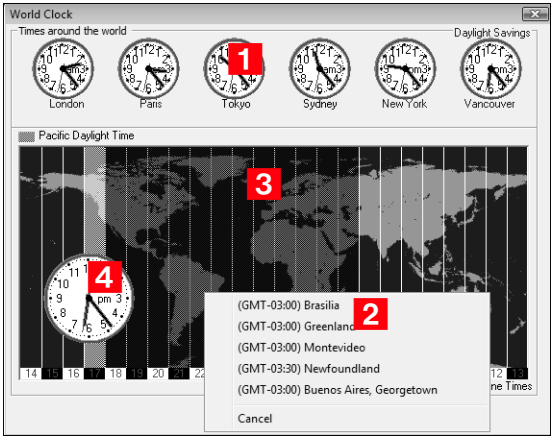
World Clock

The World Clock is a utility that allows you to view the time in various locations around the world. You determine which locations are displayed. It's great if you have international dealings of any kind—from the occasional phone call to regular contact with your international clients.

You can set the time for up to six remote locations around the world by adjusting the dials shown in the Clock frame in the World Clock window.

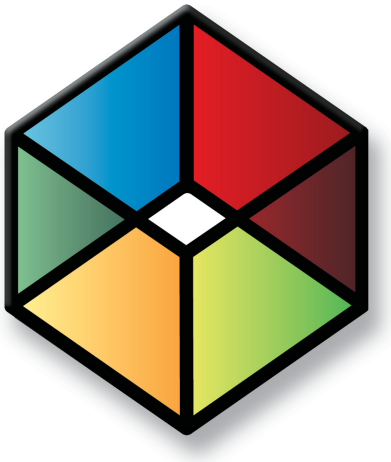
Keep the following points in mind when using the World Clock:

1. To select a time zone, right-click on one of clocks.
2. To view time zone information, click in the corresponding area of the world map.
3. To shade the area of the clock where it's night time, right-click and select **Show night**.
4. To change the time zone displayed in the large clock, click on any time zone in the world map and select the time zone.



➤ To view the World Clock

- On the **Tools** tab, select **World Clock** from the **Other** group.



CHAPTER 7

Email

Send Email to Address Book Entries

In this chapter...

"Email" on page 152
"Setting Up Email" on page 160
"Microsoft Outlook Integration" on page 162
"Microsoft Outlook Synchronization" on page 172

Email

You can use the Email window to send and receive email using your existing email system. You can also send email to Address Book entries directly from the other main windows.

Email preferences are set in Maximizer and in Administrator. To set email preferences, on the Setup tab, select Preferences, and select the Email tab.

The following sections contain additional information on using email in Maximizer:

- "Email Window" on page 152
- "Sending Email" on page 153
- "Sending Email to Address Book Entries" on page 154
- "Send Email Options" on page 156
- "Email Templates" on page 157
- "Creating Appointments and Tasks from Email" on page 158

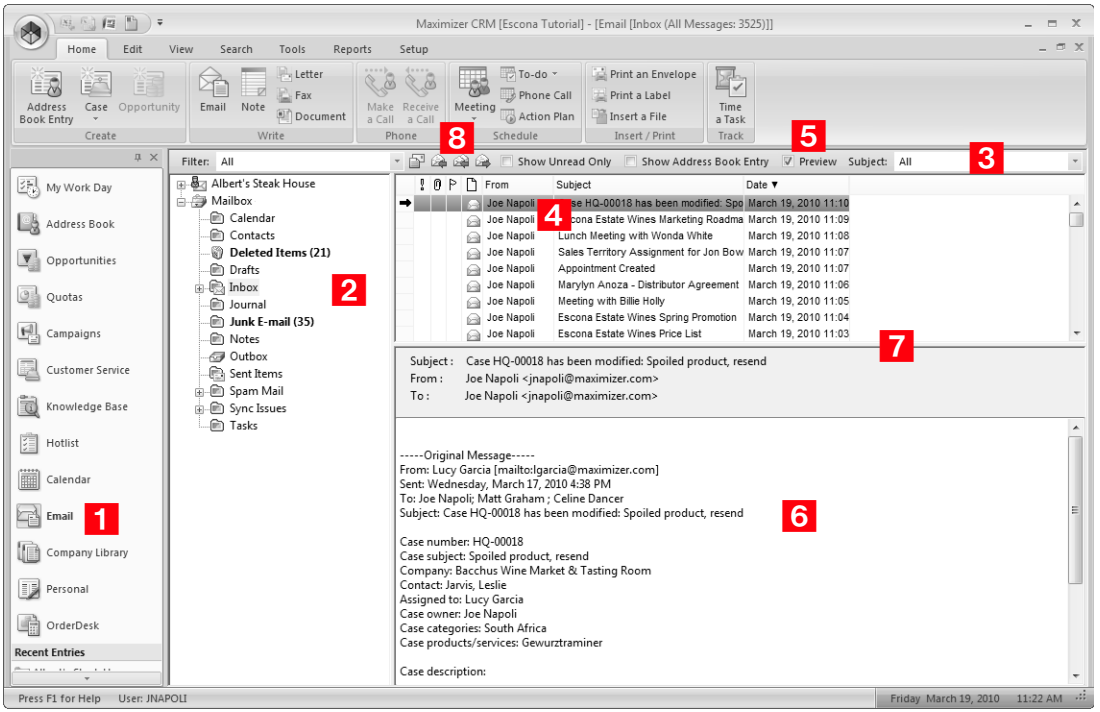
Email Window

Use the Email window to perform your email tasks. You can send email messages, reply to messages, move messages, and perform other common email tasks. You can also save messages to associated Address Book entries.

Keep the following points in mind when working with the Email window.

1. Select the **Email** icon to open the Email window.
2. Select email **folders** on the left side of the Email window.
3. To search for email messages by subject, select **Custom** from the **Subject** drop-down list, and enter the text to search for.
4. Select **email messages** in the top-right area of the window.
5. Toggle the preview pane on and off with the **Preview** checkbox in the top-right corner of the window.
6. View the currently selected email message in the **preview** pane.
7. Move the upper preview border up and down to adjust the size of the preview pane.

8 Use the icons to perform common tasks—such as **reply** and **forward**—on the selected email message.



Sending Email

You can compose email messages in HTML or plain text format depending on your email preferences. You can attach files to your message. If you are using the HTML format, you can also insert hyperlinks. To check the spelling in your message, click the Spell Checker button.

➤ To compose and send an email message

1 In the Email window, select the **Compose** icon.

– or –

In the Email window, right-click, and select **Compose New Email**.

Depending on your email preferences, the Send Email dialog box may open with options for logging the email message with Address Book entries.

To display the Send Email dialog box, select the "Always display the Send Email options before composing an email" option in your email preferences. (On the Setup tab, select Preferences, and select the Email tab.)

If necessary, adjust the email options, and click **OK**.

The Compose Email Message dialog box opens.

2. Enter email addresses in the **To**, **Cc**, or **Bcc** fields, separating email addresses with semicolons.

   – or –

   Click the **To**, **Cc**, or **Bcc** buttons and select the type of entry you want to add.

   You can select a contact from your email service provider or from your Maximizer Address Book.

3. Enter a subject and your email text.

4. If the email recipient is associated with an Address Book entry, set the logging options.

5. Click **Send**.

Sending Email to Address Book Entries

You can send email to Address Book entries directly from the Address Book, Opportunities, Customer Service, and Hotlist windows. If you send the email message from the Address Book window, the message is sent to the selected Address Book entries. If you send the email message from another window, the email message is sent to the Address Book entries associated with the selected entries.

➤ To send an email message to Address Book entries

1. Choose the entry or multiple entries for the email message by doing one of the following:
   - Select the entries.
   - Open an entry.
   - Create a list of entries.

2. On the **Home** tab, select **Email** from the **Write** group.

   – or –

   Right-click and select **Write > Email**.

Depending on your email preferences, the Send Email dialog box may open. For information on the options in the Send Email dialog box, see “Send Email Options” on page 156.

3. To add more email recipients, click the **To**, **Cc**, or **Bcc** buttons.

   You can search the current Address Book or your global address list.

   These options are available only if the One email option is selected in the Send Email dialog box.

4. Enter a **subject** and the text of the email message.

   Use the toolbar icons and font drop-down lists in the **Format Text** group to format your message.

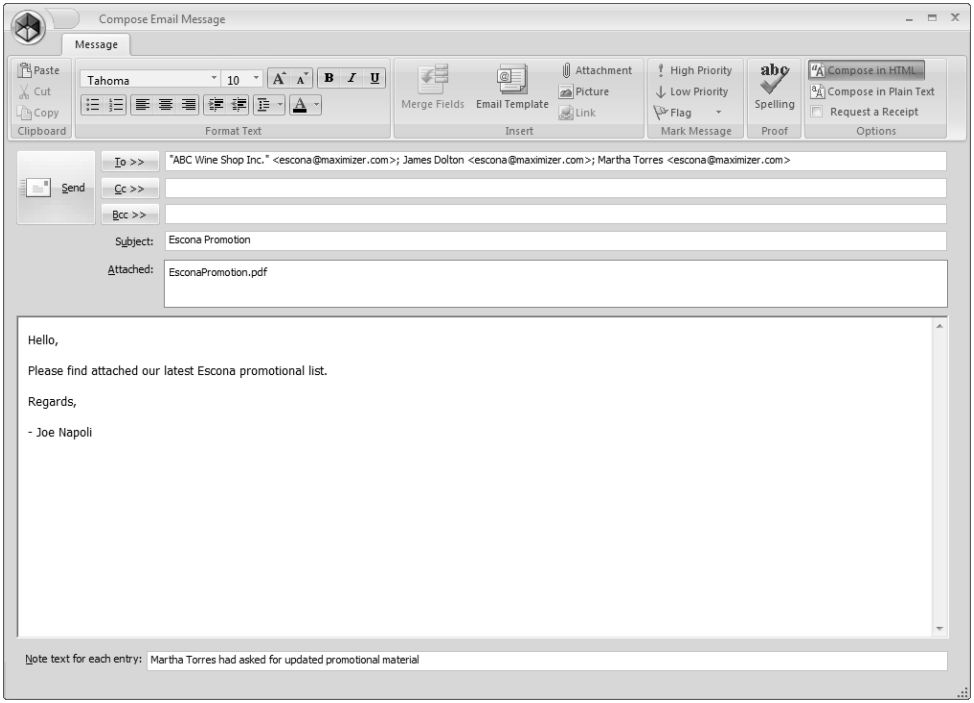
   If you are sending email to Address Book entries separately, you have the option of inserting merge fields into the message text.

   To add a merge field, select **Merge Fields** from the **Insert** group, select the field and click **Insert**. When the message is sent, the field value corresponding to the Address Book entry, opportunity, or customer service case is merged into the message.

5. Select **Attachment** from the **Insert** group to select file attachments to send with the email message.

6. In the **Note for Address Book entry** field, enter any additional text you would like to log as part of the note created by the email message.

7 Click **Send**.



Send Email Options

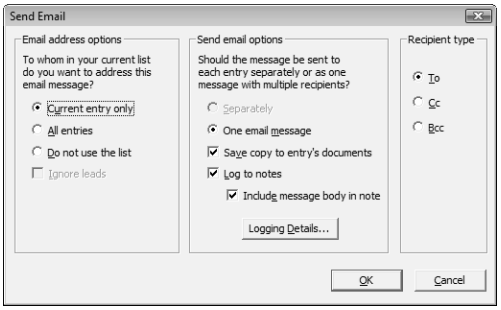
In the Send Email dialog box, you can specify how the email will be sent and set logging options. Here are some points to keep in mind:

- Select **Separately** to send a separate email message to each Address Book entry.

  If you want to send the email message to more than 1,000 entries at a time, you must either select the **Separately** option or select the entries in groups of 999 or less.
- Select **One email** to send one email message to all the selected entries at once.
- Select the **Save copy to entry's documents** option to save the message as a document for the entry.
- Select the **Log to notes** and **Include message body** options to save the message to the note created.

These options are unavailable if logging is disabled for email in your logging preferences. (On the Setup tab, select Preferences, and select the Logging tab.)

- Click the **Logging Details** button and then the **Assign More** button to log the email details to additional Address Book entries.



Email Templates

You can create email templates that you can reuse to send to many Address Book entries at different times. An email template can include merge fields that are populated with information from the selected Address Book entries, or from the Address Book entries associated with the selected opportunities or customer service cases, when email messages are sent using the template.

You can create email templates from the Compose Email Message dialog box whenever you compose a new email message. If you want to add merge fields to the email template, you must first select Address Book entries, opportunities, or customer service cases, and select to send the email message separately to the selected entries.

➤ To create an email template

1. From the Address Book, Opportunities, or Customer Service window, select the entries to send the email to.
2. On the **Home** tab, select **Email** from the **Write** group.

   Depending on your email preferences, the Send Email dialog box may open. For information on the options in the Send Email dialog box, see “Send Email Options” on page 156.

   If you want to add merge fields to your email template, you must select the **All selected entries** and **Separately** options in the Send Email dialog box.
3. Compose the text of the email message.

You can compose the email message in HTML or in plain text. You can use the formatting toolbar to apply additional formatting to the email text.

4. Select **Merge Fields** from the **Insert** group to insert merge fields in your template.
5. Select **Email Template** from the **Insert** group.

   The HTML Email Templates or Text Email Templates dialog box opens.
6. Click **Add** to add a new email template.
7. Enter a name, description, and owner for the template and click **OK**.

   To reuse this template in the future, select the template in the Available email templates list, and click **Retrieve**.

   To save changes made to the template, select the template in the Available email templates list, and click **Save**.

   To retrieve this template automatically each time you compose an email message, select **Retrieve this template when the Compose Email Message dialog is opened**.
8. Click **Close** to return to the email message.

Creating Appointments and Tasks from Email

You can create appointments and tasks directly from the Email window. You can create the appointment or task for the Address Book entry associated with the email message or for the currently selected Address Book entry, customer service case, opportunity, or campaign. You can also create a personal appointment or task that is not associated with an entry.

The subject of the email message becomes the subject of the appointment or the activity of the task. The body of the email message becomes the body note of the appointment.

➤ To create an appointment or task from an email message

1. In the Email window, select the email message you want to create an appointment or a task for.
2. On the **Home** tab, select **Meeting > Appointment for <entry>** or **To-do > Task for <entry>** from the **Schedule** group.

   – or –

   Right-click and select **Create a New > Appointment/Task for <entry>**.

Depending on the email message, you can select either the Address Book entry associated with the message or the currently selected Address Book entry, customer service case, opportunity, or campaign.

3. Enter the appointment/task details and click **OK**.
4. To save the email message as a document with the entry, specify the properties of the document and click **OK**.

➤ To create a personal appointment or task from an email message

1. In the Email window, select the email message you want to create an appointment or a task for.
2. On the Home tab, select **Meeting > Personal Appointment** or **To-do > Personal Task**.

   – or –

   Right-click and select **Create a New > Personal Appointment/Task**.
3. Enter the appointment or task details and click **OK**.

Setting Up Email

The Email window in Maximizer provides you with the ability to send and receive email within Maximizer. The Email window works with your existing email system so that you can take advantage of some of the benefits of sending and receiving email. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily.

Maximizer's Email window works much the same as any email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email.

The following sections contain information on setting up Maximizer for email:

- "Supported Email Clients" on page 160
- "Setting Up Novell GroupWise and Lotus cc:Mail/Mail" on page 161
- "Setting Up Microsoft Outlook" on page 161

Supported Email Clients

To use these features, you must already have a Messaging Application Programming Interface (MAPI) or Vendor Independent Messaging (VIM) email client. Email clients that should work with Maximizer when properly configured include the following:

- Lotus cc:Mail
- Lotus Mail
- Lotus Notes
- Microsoft Exchange Sever
- Microsoft Outlook
- Novell GroupWise

For the latest version information of compatible email programs, see the Maximizer website at

www.maximizer.com.

Setting Up Novell GroupWise and Lotus cc:Mail/Mail

If you are using Novell GroupWise, Lotus cc:Mail (MAPI), or Lotus Mail (MAPI), select the corresponding option in the advanced email preferences in Maximizer. (On the Setup tab, select Preferences, and select the Email tab. Then, click Advanced.) If you do not select the correct option, a program fault error will occur when you use the Email window. For Lotus cc:Mail and Lotus Mail, you also must have the "Override Extended MAPI" option selected in your email preferences.

Setting Up Microsoft Outlook

Maximizer cannot use Extended MAPI with the Internet Mail Only installation type. Ensure the installation type is Corporate or Workgroup.

Outlook 2007, Outlook 2003, and Outlook 2002 are Extended MAPI programs. This means the Maximizer Email window will show the same folders as Outlook.

When you open the Email window, folders such as Inbox, Outbox, Sent Items, Deleted Items, and your personal folders are displayed.

For more information on configuring Maximizer for Outlook Synchronization, refer to the *Maximizer CRM Administrator's Guide* and to Maximizer Help.

➤ To set up Maximizer for Outlook

1. On the **Setup** tab, select **Preferences**.
2. Select the **Email** tab.
3. Find the **Override Extended MAPI** option and verify this setting is disabled (the checkbox should be cleared).
4. Click **OK**.
5. Exit Maximizer.
6. Restart Maximizer.

Microsoft Outlook Integration

Microsoft Outlook integration for Maximizer installs toolbars in the Mail, Contacts, and Contact information windows in Outlook.

Outlook integration works with Outlook XP, 2003, or higher.

To access Maximizer commands, the Maximizer Add-In toolbar must be enabled. From the toolbar, you can complete the following tasks in Maximizer:

In Outlook, select View > Toolbars to view and modify the toolbars that are currently enabled.

- Create Address Book entries.
- Create cases.
- Save email messages to Address Book entries.
- View Address Book entries.

Outlook integration is not the same as Outlook synchronization, which synchronizes information in Outlook and Maximizer.

Before you can use Outlook integration, you must specify which Address Book to save the contacts and email messages to.

The following sections contain additional information on using Outlook integration for Maximizer:

- "Setting Up Microsoft Outlook Integration" on page 162
- "Selecting a Microsoft Outlook Address List for Integration" on page 164
- "Adding Address Book Entries from Microsoft Outlook" on page 165
- "Adding Customer Service Cases from Microsoft Outlook" on page 167
- "Sending Email to Address Book Entries from Microsoft Outlook" on page 168
- "Saving Email from Microsoft Outlook" on page 169
- "Viewing Address Book Entries from Microsoft Outlook" on page 171

Setting Up Microsoft Outlook Integration

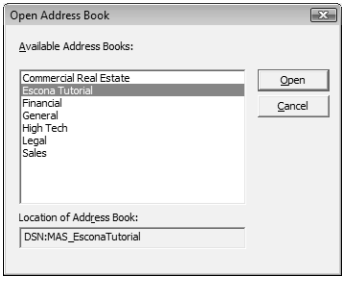
You must configure the Outlook integration to communicate with your Address Book. You must specify the Address Book and the Maximizer user ID that logs in to the Address Book. You can also set some default preferences for creating new Address Book entries.

Each Windows user can integrate Outlook with only one Maximizer Address Book on a single machine. If you use Maximizer on more than one machine, you must specify the Address Book for integration on each machine. If you want, you can specify a different Address Book for integration on each machine.

If multiple users log in to the same machine using different Windows login accounts, each user must specify the Address Book for integration in Maximizer on that machine.

➤ To set up Outlook integration

1. In Maximizer, on the **Home** tab, select **Preferences**. Then, click **Other Options** on the **System Defaults** tab.
2. Click **Address Book**.
3. If the option is available, choose to display the local or global Address Book list.
4. Select the Address Book to integrate with Outlook, and click **Open**.

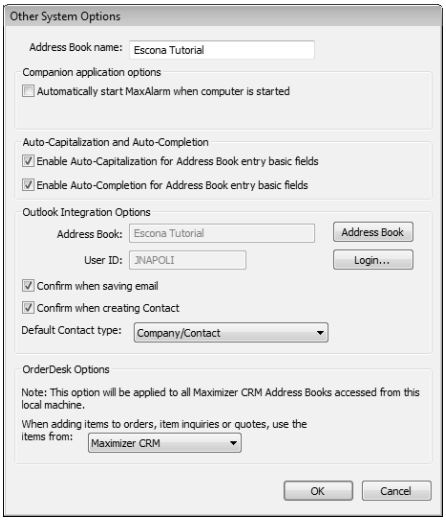


5. Enter your **User ID** and **Password**.

   If your Maximizer password changes, or if you ever need to change the User ID you use for Outlook integration with Maximizer, open the Other System Options dialog box, click the Login button, and change your login credentials.
6. Click **OK**.
7. Select the options for creating Address Book entries and saving email messages:
   - Select the **Confirm when saving email** and the **Confirm when creating Contact** options to specify details before saving email or contact information to Maximizer.
   - In the **Default Contact type** drop-down list, select the type of Address Book entry that is created when you add contacts from Outlook.

   If the "Confirm when creating Contact" option is selected, you can select a different type of Address Book entry while creating the entry.

8 Click **OK** to close the Other System Options dialog box, and click **OK** again to close the Preferences dialog box.



Selecting a Microsoft Outlook Address List for Integration

Outlook integration with Maximizer only works with address lists in the Outlook Address Book (such as Contacts), and only with one address list at a time. It does not work with the global address list or other address lists.

If Outlook is set to use the global address list or another address list, which might be the case if your organization uses Microsoft Exchange, you will see an error message when you try to save an Outlook contact to Maximizer. If you see such an error message, use the procedure below to select an Outlook address list.

➤ To select an Outlook Address Book list

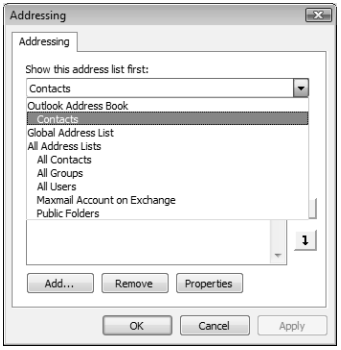
1 In Outlook, select **Tools > Address Book**.

The Address Book dialog box opens.

2 Select **Tools > Options**.

3 Open the **Show this address list first** drop-down list, and select one of the items under Outlook Address Book.

Typically, there is only one item in this list, called Contacts. In that case, select Contacts.



4 Click **OK**, and then close the dialog box in Outlook.

Adding Address Book Entries from Microsoft Outlook

You can create Address Book entries in Maximizer directly from Microsoft Outlook. You can create Address Book entries from Outlook contacts or from email messages in Outlook. If you create the entry from an email message, the entry is created from the email sender (From address).

You can access the command from the Save Contact to Maximizer button in a contacts window or from the Save Sender As Contact to Maximize button from a mail window in Outlook.

If you cleared the "Confirm when creating Contact" option when setting up Outlook integration, Maximizer automatically creates entries as follows:

- If Individual is selected as the default contact type, Maximizer creates an Individual Address Book entry.
- If Company/Contact is selected as the default contact type, Maximizer creates a Company/Contact Address Book entry. If the Outlook contact information does not include a company name, you are prompted to provide one when saving the Contact to Maximizer.

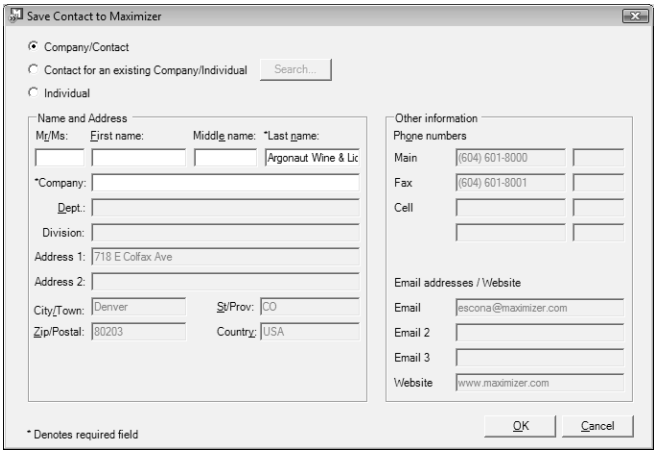
➤ To add an Address Book entry from Outlook

1 In Outlook, select the contact or the email message.

2 Select the **Save Contact to Maximizer** or the **Save Sender As Contact to Maximizer** icon.

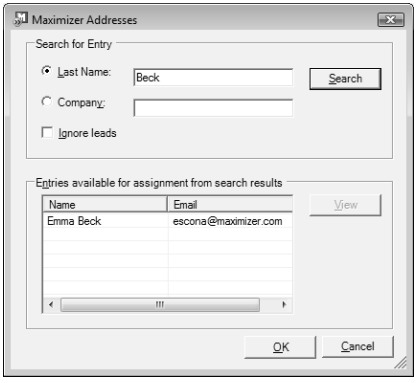
If the "Confirm when creating Contact" option is disabled, the Company or Individual Address Book entry is created automatically in Maximizer.

If the "Confirm when creating Contact" option is selected, the Save Contact to Maximizer dialog box opens.



To enable or disable the "Confirm when creating Contact" option, click Other Options in the system defaults preferences. (On the Setup tab, select Preferences.)

3. If necessary, change the Address Book entry type.
4. If you are creating a Contact for an existing Company/Individual, click **Search** to find and select the Address Book entry for which you want to create a Contact.



5. Edit the information in the available fields as required.
6. Click **OK** to save the entry.

Adding Customer Service Cases from Microsoft Outlook

You can create customer service cases in Maximizer from email messages in Microsoft Outlook. You can create a new Address Book entry while creating the case or create the case for an existing Address Book entry.

You have a number of options when creating customer service cases in Outlook:

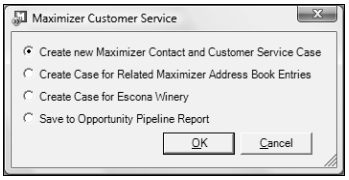
- Create a new contact and a new customer service case at the same time.
- Create a new case from a related Address Book entry. This option lets you search your Address Book for an entry.
- Create a case for the selected Address Book entry. This option is available only if an Address Book entry is currently selected in Maximizer.
- Save the email message to an existing customer service case. This option is available only if a customer service case is currently selected in Maximizer.

➤ To add a customer service case from Outlook

1. Select an email message in Outlook, and select the **Create CS Case** icon.

   The Maximizer Customer Service Case dialog box opens.

2. Select the type of entry you want to create, and click **OK**.


Maximizer Customer Service
Create new Maximizer Contact and Customer Service Case
Create Case for Related Maximizer Address Book Entries
Create Case for Escona Winery
Save to Opportunity Pipeline Report
OK
Cancel

3. If you are creating a new Contact at the same time as the customer service case, enter the information for the Contact.
4. If necessary, select the Address Book entry to which you want to save the email message.

   If there is an associated Address Book entry for the selected email message, it is displayed in the Entries assigned for Case Creation list. If necessary, search for entries and assign them to the case.

5. Specify the most important information about the case.

The Subject and Description fields default to the subject and content of the email message. To specify Products/Services or Categories for the case, select the ellipsis button next to the appropriate field and select values for the field.

Other fields for the case must be specified in Maximizer.

Case for Joe Napoli
Company/Individual: Escona Winery
Contact: Joe Napoli
Case description
Products/Services: All
Categories: Cabernet Sauvignon
*Subject: Price List
*Description: One of our most asked-for items is our price list. All of our wines, as well as a variety of ready-made gift baskets, are available to order online. See the attached document for the complete price list.
OK
Cancel

Sending Email to Address Book Entries from Microsoft Outlook

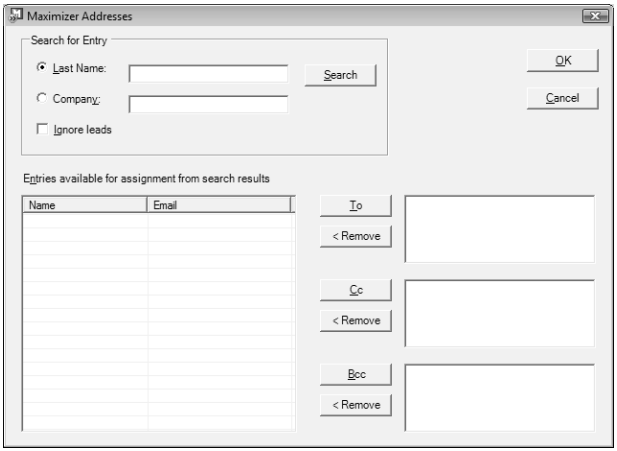
You can use Microsoft Outlook to send email messages to Maximizer Address Book entries, even if the Address Book entries do not have related contact records in Outlook.

This method may not be available if you are using Word as your email editor. To determine if Word is your email editor, select Tools > Options from the menu in Outlook, and click the Mail Format tab. If the "Use Microsoft Office Word to edit e-mail messages" checkbox is selected, the Maximizer Addresses button may not be available in the new email message dialog box.

➤ To send an email message to Address Book entries from Outlook

1. In Outlook, open a new email message.
2. Click the **Maximizer Addresses** button.

   The Maximizer Addresses dialog box opens.



3. Select **Last Name** or **Company** and enter the full or partial last name or company name to search for.
4. Click Search.

   The names and primary email addresses of the matching Address Book entries appear in the "Entries available for assignment from search results" list.
5. Select the Address Book entry from the list, and click the To, Cc., or Bcc. button.

   You can select multiple entries by holding down the Ctrl key or Shift key.
6. Click **OK**.

Saving Email from Microsoft Outlook

You can save email messages in Microsoft Outlook directly to Address Book entries in Maximizer. Email messages are saved in the documents tab of the Address Book entries. You can save and send a new email message to an Address Book entry, or you can save an existing email message to an Address Book entry.

If there are no Address Book entries associated with the email message, you either create an entry yourself or let Maximizer create it for you, depending on your preference settings. The email message is then saved to this entry's documents. If the email address does not have a record in Outlook contacts, Maximizer creates a corresponding Outlook contact.

If you are using Outlook Synchronization for Address Book entries, Outlook integration also adds the newly created Address Book entries to the synchronized Favorite List in Maximizer and category in Outlook, so they will get synchronized in the future.

➤ To save an email message to an Address Book entry from Outlook

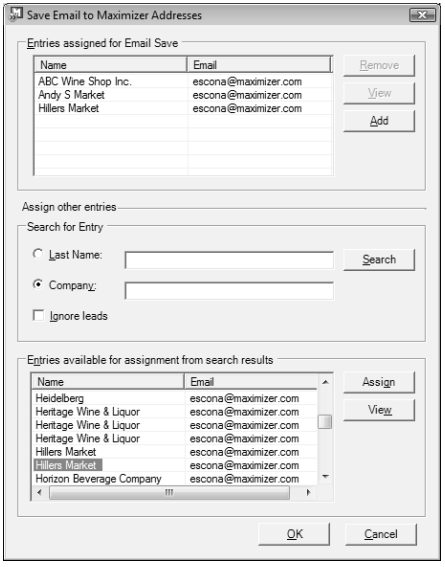
1 In Outlook, select the email message, and select the **Save Email to Contact in Maximizer** icon.

– or –

In Outlook, compose a new email message, and select the **Send email and save to Contact in Maximizer** icon.

If the "Confirm when saving email" option is disabled, the email message is saved as a document to the Address Book entry that contains the email address of the sender or recipient.

If the "Confirm when saving email" option is selected, the Save Email to Maximizer Address Book Entry dialog box opens. The Entries assigned for save list displays Address Book entries that contain the email address of the sender or recipient. If no such entries exist, this list is empty.



To enable or disable the "Confirm when saving email" option, click Other Options in the system defaults preferences. (On the Setup tab, select Preferences.)

2 If necessary, click **Add** to create an Address Book entry to save the email message to. Then, enter and edit information as required and click **OK**.

3 To remove an entry from the Entries assigned for Email Save list, select the entry and click **Remove**.

4 If necessary, select other Address Book entries to save the email message to:

- Search for the entries by **Company** or **Last Name** and click **Search**.

- Select the entries from the **Entries available for assignment from search results** list and click **Assign**.

5 Click **OK**.

Viewing Address Book Entries from Microsoft Outlook

You can automatically open Maximizer to view Address Book entries from Microsoft Outlook. You can view Address Book entries associated with Outlook contacts or with email messages.

Which Maximizer Address Book entry is associated with the Outlook contact depends on how the association was created:

- If you are using Outlook Synchronization, and the Outlook contact is synchronized with Maximizer, the View Contact in Maximizer button takes you to the synchronized Address Book entry.
- If the Maximizer Address Book entry was created from Outlook using the Save Sender as Contact in Maximizer button, the View Contact in Maximizer button takes you to the Maximizer Address Book entry that was created previously.
- Otherwise, Outlook Integration uses email addresses to associate Outlook contacts with Maximizer Address Book entries, so if more than one Maximizer Address Book entry has the same email address as the selected contact, all matching Address Book entries are highlighted in Maximizer. It matches based on Email 1, 2, or 3 in the Maximizer Address Book entry.

When you view Address Book entries from Outlook, Maximizer opens displaying the Address Book window. The window lists all matching entries.

➤ To view an Address Book entry from Outlook

1 In a mail or contacts window in Outlook, select an email message or contact.

2 Select the **View Contact in Maximizer** icon.

Microsoft Outlook Synchronization

Microsoft Outlook Synchronization mirrors select appointments, tasks, and Address Book entries between Maximizer and Microsoft Outlook to ensure the entries exist in both programs and that they both contain the same information.

Outlook Synchronization settings are configured on a per-user basis, and each Maximizer user has one set of configuration settings. Outlook Synchronization preferences enable you to select which entries will be synchronized:

- For appointments and tasks, only entries scheduled within the specified date ranges will synchronize, with the exception of recurring appointments and tasks, as described in the following section. These settings apply to appointments and tasks in both Maximizer and Outlook.
- For Maximizer Address Book entries, only the entries belonging to the selected Favorite List will synchronize with Outlook. Those entries will be assigned to the specified Outlook category.
- For Outlook contacts, only the contacts assigned to the specified category will synchronize with Maximizer. Those entries will be assigned to the selected Favorite List in Maximizer.
- Products/Services and Categories are synchronized to Outlook. Attendees, resources, and any notes you add to an appointment are also synchronized. These items appear as part of the appointment dialog box in Outlook.

Outlook Synchronization preferences also enable you to specify how often to synchronize and how to handle conflicts when the same entry has been modified in both Outlook and Maximizer.

The following sections contain additional information on Outlook Synchronization:

- "Synchronizing Appointments and Tasks with Microsoft Outlook" on page 173
- "Microsoft Outlook Synchronization and MaxSync for Microsoft Exchange" on page 174
- "Microsoft Outlook Synchronization and MaxExchange Synchronization" on page 174
- "Setting Up Microsoft Outlook for Synchronization" on page 175
- "Configuring Microsoft Outlook Synchronization" on page 175
- "How Phone Numbers are Synchronized with Microsoft Outlook" on page 177
- "Manually Synchronizing with Microsoft Outlook" on page 178

Synchronizing Appointments and Tasks with Microsoft Outlook

When Outlook Synchronization is configured, it can synchronize select appointments and tasks between the Maximizer Address Book and Microsoft Outlook. Only those appointments and tasks scheduled within the specified date ranges will synchronize, with the following exceptions:

- If an instance of a recurring appointment occurs within the specified date range, all instances of the recurring appointment will be synchronized.
- If a task is scheduled prior to the specified date range, but the "Carry forward unfinished tasks" option is selected, the task will be synchronized.

You can also specify whether to synchronize private appointments and/or tasks.

Recurring Appointments

Recurring appointments in Microsoft Outlook synchronize to Maximizer as recurring appointments unless they have no end date. If the recurring appointment has no end date, only the first occurrence synchronizes with Maximizer, not the recurrences. To synchronize recurring appointments with Maximizer, always provide an end date.

Note that while it is possible to modify the Private property of a single instance of a private appointment in Maximizer, this property can be changed only for the entire series of recurring appointments in Outlook. Therefore, if you change the Private property of a single instance of a recurring appointment in Maximizer, this change will not be synchronized to Outlook.

Recurring Tasks

If you synchronize a recurring task from Outlook, and then mark the task as complete in Maximizer, Maximizer cannot create the next instance of the recurring task. You should mark the task as complete in Outlook, which will create the next instance of the task, and then re-synchronize with Maximizer.

If you synchronize a recurring task from Outlook, and then delete the task in Maximizer, all instances of the recurring tasks are deleted. If you want to delete a single instance of a recurring task, you should delete the task in Outlook and then re-synchronize with Maximizer.

Group Appointments

When using Outlook Synchronization, group appointments in Maximizer synchronize to Outlook for the current user only. However, the synchronized appointment in Outlook includes all the locations, resources, and attendees information in the appointment notes. To fully synchronize group appointments between Maximizer and Outlook, use MaxSync for Microsoft Exchange.

Microsoft Outlook Synchronization and MaxSync for Microsoft Exchange

If MaxSync for Microsoft Exchange is installed and configured for the current Address Book, Outlook Synchronization no longer synchronizes appointments or tasks. However, Outlook Synchronization still handles Address Book entry synchronization. If MaxSync for Microsoft Exchange is active, the appointment and task synchronization sections of the Outlook Synchronization configuration properties are disabled.

Refer to the *Maximizer CRM Administrator's Guide* or Administrator Help for more information about MaxSync for Microsoft Exchange.

Microsoft Outlook Synchronization and MaxExchange Synchronization

In a MaxExchange environment with Microsoft Outlook Synchronization enabled, Maximizer can synchronize with Outlook on a single server or remote only. Otherwise, duplication of entries may occur.

When MaxExchange is installed, and at least one MaxExchange remote has been added as a distribution site, a MaxExchange Location button appears at the bottom of the Outlook Synchronization tab. Clicking this button opens a dialog box containing a drop-down list of MaxExchange servers and remotes for the current Address Book. Select the MaxExchange server or remote where Maximizer will synchronize entries with an Outlook profile for the selected user.

Setting Up Microsoft Outlook for Synchronization

Microsoft Outlook contacts are synchronized with Maximizer based on their assigned categories. Each Outlook contact that you want to synchronize, must be assigned to a category.

The following procedures describes how to assign a new category named Maximizer to selected Outlook contacts.

➤ To assign a category to Outlook contacts

1. In Outlook, open the Address Book list to synchronize with Maximizer.

   For example, open the Contacts Address Book list.

2. Select **Edit > Select All to** select all entries in the list.

   – or –

   Or select specific entries in the list to assign for synchronization.

3. Select **Edit > Categories.**

4. Click **Master Category List** and add a new category called **Maximizer**.

5. In the **Available categories** list, select the checkbox beside the Maximizer category and click **OK**.

Configuring Microsoft Outlook Synchronization

Maximizer Address Book entries are synchronized with Microsoft Outlook based on Favorite Lists. Before configuring Outlook synchronization in Maximizer, you must create a Maximizer Favorite List that specifies which Address Book entries are to be synchronized with Outlook.

➤ To configure Outlook synchronization

1. On the **Setup** tab, select **Preferences**, and select the **Outlook Synchronization** tab.

2. Under **Synchronization frequency**, specify how often Maximizer should synchronize with Outlook.

   If you select Never (manual synchronization), the user must synchronize manually. (On the Add-Ins tab, select Synchronize with Outlook from the Office group.)

3. Under **Conflict resolution**, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.

4 Under **Options**, specify the remaining settings.

- In the **Outlook profile** field, enter the name of the user's Outlook profile.

  This information must be obtained from the user's computer.

- To ignore the computer name when synchronizing, select the **Ignore computer name** checkbox.

Do not select Ignore computer name if you use multiple computers and synchronize to a different Outlook profile on each computer.

- To synchronize appointments, select the **Synchronize appointments** checkbox and specify the date range of appointments to synchronize.

  Private appointments will not be synchronized unless the **Include private appointments** checkbox is also selected.

- To synchronize tasks, select the **Synchronize tasks** checkbox and specify the date range of tasks to synchronize.

  Private tasks will not be synchronized unless the **Include private tasks** checkbox is also selected.

  To also synchronize incomplete tasks that are scheduled prior to the specified date range, select the **Carry forward unfinished tasks** checkbox.

- To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox.

- To specify the mapping between Outlook and Maximizer phone number fields, click **Phone Mapping**, and select the Maximizer phone number field to map to each Outlook phone number field.

  If necessary, use the Move Up and Move Down buttons to prioritize the fields in the phone mapping list.

  Maximizer supports only four phone numbers for an Address Book entry, so when you synchronize from Outlook to Maximizer, only four Outlook phone numbers are synchronized.

- In the **Synchronize Address Book entries from Favorite List** drop-down list, select the Maximizer Favorite List to synchronize.

- In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

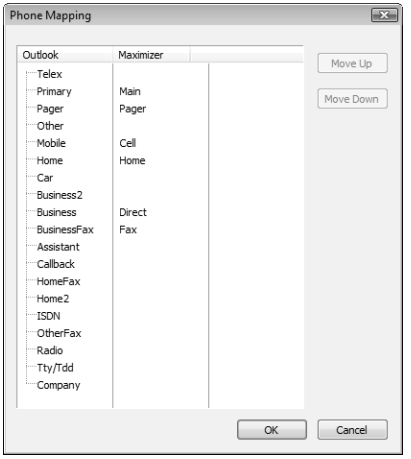
5 If you are a MaxExchange user, click **MaxExchange Location**, select the MaxExchange server or remote where your Outlook profile can synchronize with Maximizer, and click **OK**.

6 Click **OK**.

How Phone Numbers are Synchronized with Microsoft Outlook

In an Outlook to Maximizer synchronization, Maximizer first tries to synchronize mapped phone numbers whose descriptions exist in the default Address Book entry. Maximizer then tries to synchronize mapped phone numbers that appear highest in the phone mapping list. Only mapped phone numbers are synchronized to Maximizer.

In the following examples, the phone number descriptions in the default entry are Main, Fax, and Cell, and the mapped phone numbers are as follows:



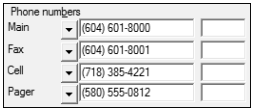
Maximizer Field	Outlook Field
Main	Primary
Pager	Pager
Cell	Mobile
Home	Home
Direct	Business
Fax	BusinessFax

Example: Outlook values exist for all mapped phone numbers

If Outlook values exist for all mapped phone numbers, the following phone numbers would be included in the synchronized entry.

Main, Fax, Phone, Pager

Because the fourth phone number description is empty in the default entry, Maximizer fills it with the Pager phone number description. Main is higher in the phone mapping list, but it has already been synchronized.

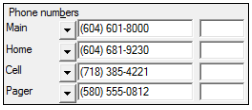


Example: Outlook values exist for three mapped phone numbers

If Outlook values exist for all mapped phone numbers except Fax, the following phone numbers would be included in the synchronized entry.

Main, Home, Cell, Pager

As in the previous example, Maximizer uses Pager for the fourth phone number description. In a later pass, Maximizer determines that there is not an Outlook value for Fax, so it replaces the Fax phone number description with Home, the highest phone number that is not synchronized in the phone mapping list.



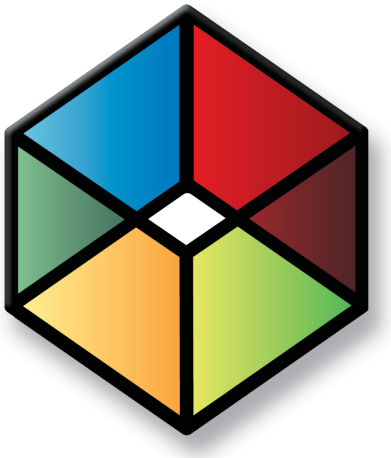
Manually Synchronizing with Microsoft Outlook

You can manually synchronize your Maximizer Address Book with Microsoft Outlook at any time. After synchronizing, you can retrieve the Favorite List used for synchronization to view the changes.

➤ To synchronize with Outlook

- On the **Tools** tab, select **Synchronize with Outlook** from the **Office** group.

  Depending on how many Outlook contacts you are synchronizing, the processing time will vary. A message box appears when the synchronization is complete.



CHAPTER 8

Opportunities

Organize Your Sales with Opportunity Management

In this chapter...

"About Opportunities" on page 180
"Adding Opportunities" on page 183
"Sales Teams" on page 185
"Strategies" on page 186
"Email Notification for Opportunities" on page 195
"Opportunity Pipeline Report" on page 197
"Quotas" on page 198

About Opportunities

Opportunity management helps you and your colleagues manage complex sales. Complex sales involve the participation of more than one person in the buying decision and require the support of a sales team. Prospects for complex sales can range from single businesses to multiple corporations or governments.

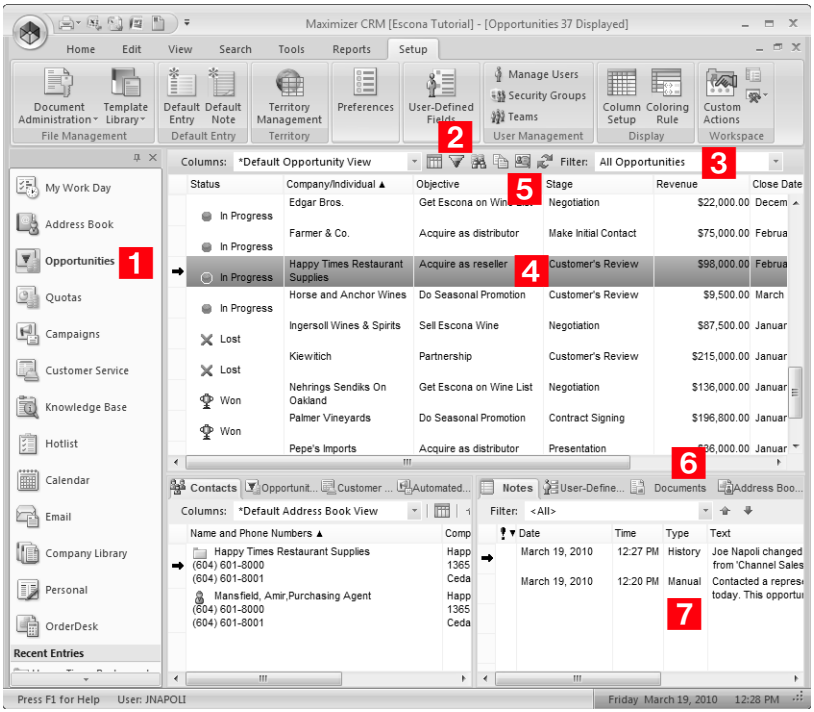
- Create strategies—detailed plans that identify the factors that influence a sale and the activities you must perform to close the opportunity.
- Apply these strategies to opportunities.
- Effectively schedule and coordinate the selling process among all members of your sales team.
- Ensure that all the right people in your organization have up-to-date information about the status of your opportunities.
- Forecast the probability of successfully closing your opportunities.
- Analyze the effectiveness of your strategies and create new ones for new opportunities.

In short, Maximizer helps you define and strengthen your selling methodology. Your sales team can define a strategy—what you need to do to close a sale and how to address the issues and obstacles involved—and then apply this strategy to opportunities.

Opportunities Window

Keep the following points in mind when working with the Opportunities window:

1. Select the **Opportunities** icon to open the Opportunities window.
2. Use the **view bar** buttons for common opportunity tasks.
3. Use the **Filter** drop-down list to show all opportunities, team-updated opportunities, or current opportunities.
4. Double-click an **opportunity** to view or modify it.
5. Click the **View in Address Book** button in the View bar or choose the option from the shortcut menu to view the Address Book entry associated with the current opportunity.
6. View additional information for the selected opportunity in the **following windows**.
7. View **notes** that Maximizer automatically creates to record opportunity activity.



Viewing Opportunities

You can view and modify existing opportunities in your Address Book from the Opportunities window or from the Address Book entry associated with the opportunity.

➤ To view an opportunity from the Opportunities window

1 Select the **Opportunities** icon to open the Opportunities window.

The Opportunities window opens.

2 If necessary, select an option from the **Filter** drop-down list.

- **All Opportunities** displays all opportunities that you have the rights to view.
- **Current Opportunities** displays the opportunities that are in progress.
- **Team Updated Opportunities** displays opportunities that have been updated by remote sales teams.

3 Double-click on an opportunity to open it.

The opportunity dialog box opens displaying the details of the opportunity.

4 Select the other tabs to view more information on the opportunity.

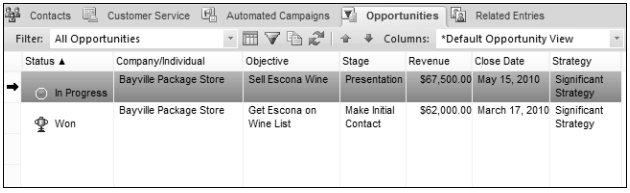
5 If necessary, click **OK** to save changes made to the opportunity.

➤ To view an opportunity from an Address Book entry

1 Select the Address Book entry.

2 Select the **Opportunities** following window.

All opportunities for the current Address Book entry are displayed in the list.



3 Click on an opportunity to open it.

Adding Opportunities

All opportunities have an associated Address Book entry. You can add new opportunities by selecting an Address Book entry in the Address Book window, then adding the new opportunity. You can also select existing opportunities, customer service cases, tasks, or appointments associated with the Address Book entry.

➤ To add an opportunity

1. Select or open the Address Book entry or an opportunity or case associated with the Address Book entry.
2. On the **Home** tab, select **Opportunity** from the **Create** group.

   – or –

   Drag and drop the entry to the **Opportunities** following window.

   A new opportunity dialog box opens.
3. Specify the basic fields for the opportunity.
   - Enter the opportunity **Objective**. The objective should describe the goal of this opportunity.
   - Select the applicable **Products/Services** and **Categories**.
   - Enter the **Description** of the opportunity.
   - Select the **Stage** of the opportunity.

     For example, if you feel confident the opportunity is a good investment of your time, you may select a value such as "Initiate Contact". The stage coincides with the Probability bar. Note that stages are set up in the opportunity preferences in Administrator. (Select File > Preferences, and select the Opportunity tab.) If you are using a strategy, this rating is updated automatically based on the completed success factors in the strategy (steps and activities). If you are not using a strategy, this field is set manually by selecting a stage.

     You can also enter the Confidence rating. This field is similar to the Stage field. However, it is not linked to the probability of close and is set based on the sales representative's feeling about the opportunity.

If you have upgraded opportunities from a previous version of Maximizer, ratings are transferred to the Stage field.

4. Select a **Key Fields** list and then select the appropriate Key Fields for the opportunity.

   Key Fields are important user-defined fields specific to opportunities and are defined in the Key Fields preferences in Administrator. (Select File > Preferences, and select the Key

Mandatory opportunity fields are denoted by an asterisk.

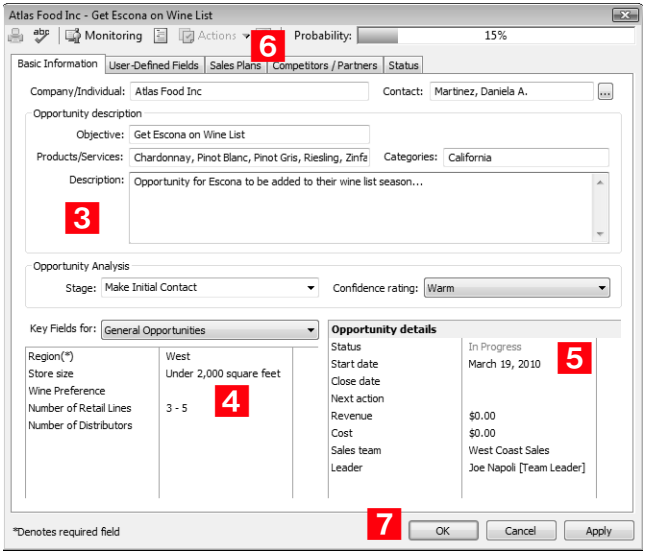
Fields tab.) An unlimited number of Key Fields lists can be set up using up to eight opportunity user-defined fields for each list.

5 Enter the opportunity's **details** such as the revenue, cost, sales team and leader.

6 Work through the remaining tabs, entering the opportunity's details including the user-defined fields, strategy, competitors, partners, and status.

7 Click **OK** to save the opportunity.

If multi-currency is enabled for your Address Book and currencies other than the default currency have been set up, you can select a specific currency for the opportunity revenue field.



Sales Teams

Maximizer offers you the ability to assign an opportunity to any sales team your system administrator has set up in Administrator. Teams allow you to delegate individual activities of the opportunity to members of the team. These activities appear in the team member's Hotlist for completion by the scheduled time. For information on setting up sales teams, see the *Maximizer CRM Administrator's Guide*.

Sales Team Members

Sales team are composed of the following types of members:

- **Team leader –** In a team, one person is designated as a team leader who has the right to make changes to the opportunity as well as the opportunity's team.
- **Team member –** A regular team member does not have the right to change the opportunity or the team. The member's role is to perform the tasks the team leader assigns.
- **Team member with edit rights –** In Maximizer, the team leader can grant any member the right to edit the opportunity, which essentially gives the same abilities of the team leader. This right must be granted on a per-opportunity basis, unless your system administrator specifies otherwise.

If you are working on an opportunity as a team leader or a team member with edit rights, you have the ability to delegate the opportunity's activities to individual team members. You can modify the team's membership or members' rights at any time. After you assign a team to work on an opportunity, you can then delegate activities and modify the team.

Strategies

Strategies use multiple factors to assess the probability of winning opportunities. They provide a way of forecasting based on defined metrics for the criteria of closing an opportunity. If your company has existing methods of calculating the probability of winning opportunities, they can be translated into strategies.

Strategies are most often used in complex projects involving large risk or long-term planning.

After you have gathered your organization's strategy information, you can enter this information into the Strategy Library. You can enter an unlimited number of strategies, and you can use the components of one strategy to build other strategies.

The following sections contain additional information on strategies:

- "Strategy Components" on page 186
- "Strategy Library" on page 188
- "Scheduling Strategies for Opportunities" on page 189
- "Progress Indicator" on page 192

Strategy Components

Strategies are made up of the following components:

- **Steps –** A step is a milestone in the strategy that reflects actions that must be taken when pursuing the opportunity. Each step represents one or more activities that must be accomplished before the step is considered complete.
- **Activities –** An activity is an action that forms the smallest building block in the strategy. As your organization works through an opportunity, activities are sent to the team members. An activity contains a description of the action, an estimate of the time it will take, and an estimate of its cost.
- **Roles –** A strategy probably will be applied to many different opportunities, so you may not know the names of the people who will directly influence the outcome of an opportunity. You should, however, identify the key roles that will be assumed by key people. You will then assign each role a weight in the same way that you assign weights to the strategy's success factors.
- **Success Factors –** Factors such as cost, features, and customer needs will influence the sale of your product or service. When you develop a strategy, choose success factors that you believe will play a large part in determining the successful outcome of an opportunity. Then assign each success factor a weight based on your assessment of how much it will influence the outcome of the opportunity.

Steps and Activities

Some steps may be so simple that there is no need to break them down further. In most cases, however, you will find it easier to develop a strategy that works if you first define the major steps and then break down each step into a series of activities that you can schedule and assign to team members.

For instance, for Escona you may use something like the following:

Steps	Activities
Arrange tour and preliminary meeting	Send price list and Escona information. Call distributor to arrange meeting and tour.
Write and present agreement	Finalize reseller agreement Create final draft of agreement Present agreement to distributor
Close deal and sign agreement	Coordinate signing of agreement Fill out product order Arrange partnership dinner

Each activity is assigned to a single user or sent to a team member. When the team members mark an activity as completed, Maximizer updates the status of the opportunity accordingly.

The Strategy Library requires you to define activities separately from steps. This allows you to use an activity in several different steps. When you assign activities to a step, you simply select from a list of available activities.

Roles

The next step in developing your strategy is to determine the key roles—positions assumed by key people that will directly influence the outcome of an opportunity that is assigned to this strategy.

When you are defining a strategy, you don't necessarily know who will fill these roles for each opportunity. If you can define generic roles for your strategies—for instance, the CEO and Purchasing Agent—you can later use people's names for those generic roles for individual opportunities.

Success Factors

Strategies include influences called success factors. Choose success factors with care—they are used to estimate the probability of a successful outcome of an opportunity. Success factors should be defined based on the experience of your sales people. After choosing a success factor, you also assign a weight to the success factor based on your assessment of importance. Success factor definitions let Maximizer tell you how the opportunity is progressing and how you can improve your probability of success. Once you have defined a success factor, you can use it in any number of different strategies.

Maximizer includes two success factors:

- **Political Alignment –** This success factor measures the impact of the key people who can influence the outcome of an opportunity.
- **On Schedule –** Maximizer uses this success factor to determine whether an opportunity is ahead or behind schedule.

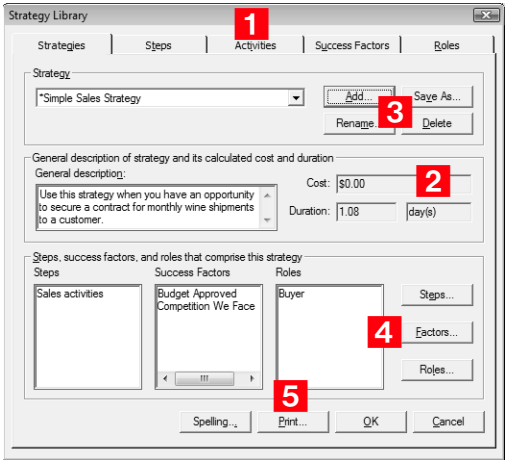
Success Factors are defined in Administrator. These two factors, along with the others that you define, must be weighted according to their importance in pursuing the opportunity. You can't delete the predetermined success factors—if these success factors have no significance, assign the success factors a weight of zero, or don't assign them to the strategy.

Strategy Library

Once you have your strategy planned on paper, entering it into Maximizer is easy. The Strategy Library is a tabbed dialog box in which you can create a library of roles, success factors, activities, and steps. You use these elements when you add a new strategy to the library. After designing a strategy, you can apply it to any new opportunity you create.

1. Each tab lets you construct a different strategy element. Start with the Roles tab and finish with the Steps tab before you construct your strategy in the Strategies tab. These elements are then selected and assembled into your new strategy.
2. Cost and duration are automatically calculated from the cost and effort of the component activities.
3. Use the buttons in the **Strategies** area of the dialog box to add, copy (Save As), rename, or delete strategies.
4. When you are ready to put together the strategy, use the **Steps**, **Factors**, and **Roles** buttons to add these components to the strategy.

5 Click **Print** to print the selected strategy.



Scheduling Strategies for Opportunities

Once strategies are defined in the Strategy Library, you can schedule a strategy for an opportunity. This will ensure you keep up to date with all of the roles, success factors, and steps that influence an opportunity's success.

Note that if you change the scheduled strategy for an opportunity, all incomplete activities for the initial strategy are removed from the opportunity. Complete activities remain in the opportunity. After a different strategy is scheduled for an opportunity, the activities associated with that strategy are applied to the opportunity. If you had standings associated with roles in the previously scheduled strategy, the standings are carried over to the newly scheduled strategy.

➤ To schedule a strategy for an opportunity

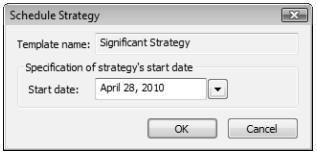
1 Open the opportunity, and select the **Sales Plans** tab.

The Show strategy option should be selected by default.

2 From the **Strategy template** drop-down list, select a strategy.

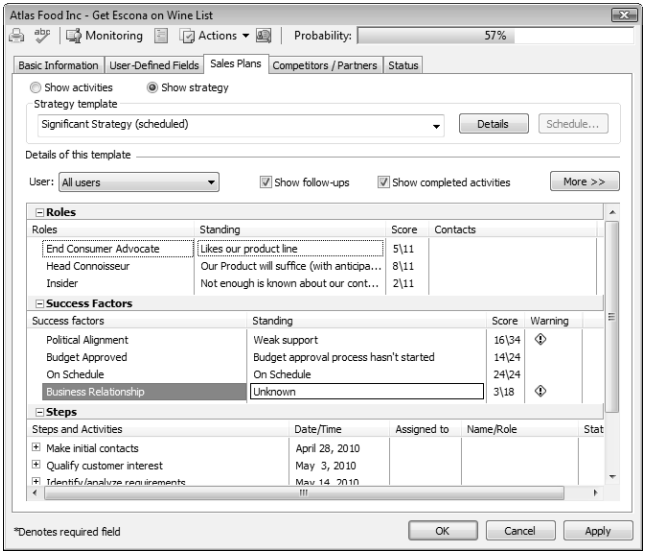
You can click **Details** to view specific properties of the strategy such as the description and cost.

3 Click **Schedule** and specify the **Start date** for applying the strategy. Then, click **OK** to return to the Sales Plans tab.



4 For each role in the strategy, click in the **Standing** column and select a standing for the role. You can also click in the **Contacts** column to select a Contact for the role.

5 For each success factor in the strategy, click in the **Standing** column and select a standing for the success factor. Note that the "On Schedule" and "Political Alignment" success factors are calculated automatically.

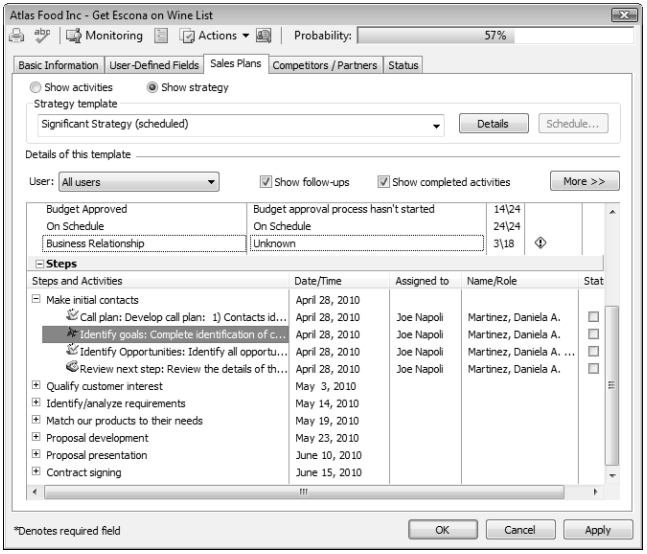


6 Select a step and click the **plus sign** to view all activities for this step.

7 If a team is assigned to the opportunity, delegate team members to specific activities in steps. Double-click on an activity and choose a user from the **Team member responsible for completion** drop-down list.

You can update the strategy as roles become more influential, success factors change, and steps are completed. The progress indicator changes automatically in alignment with the success of the opportunity.

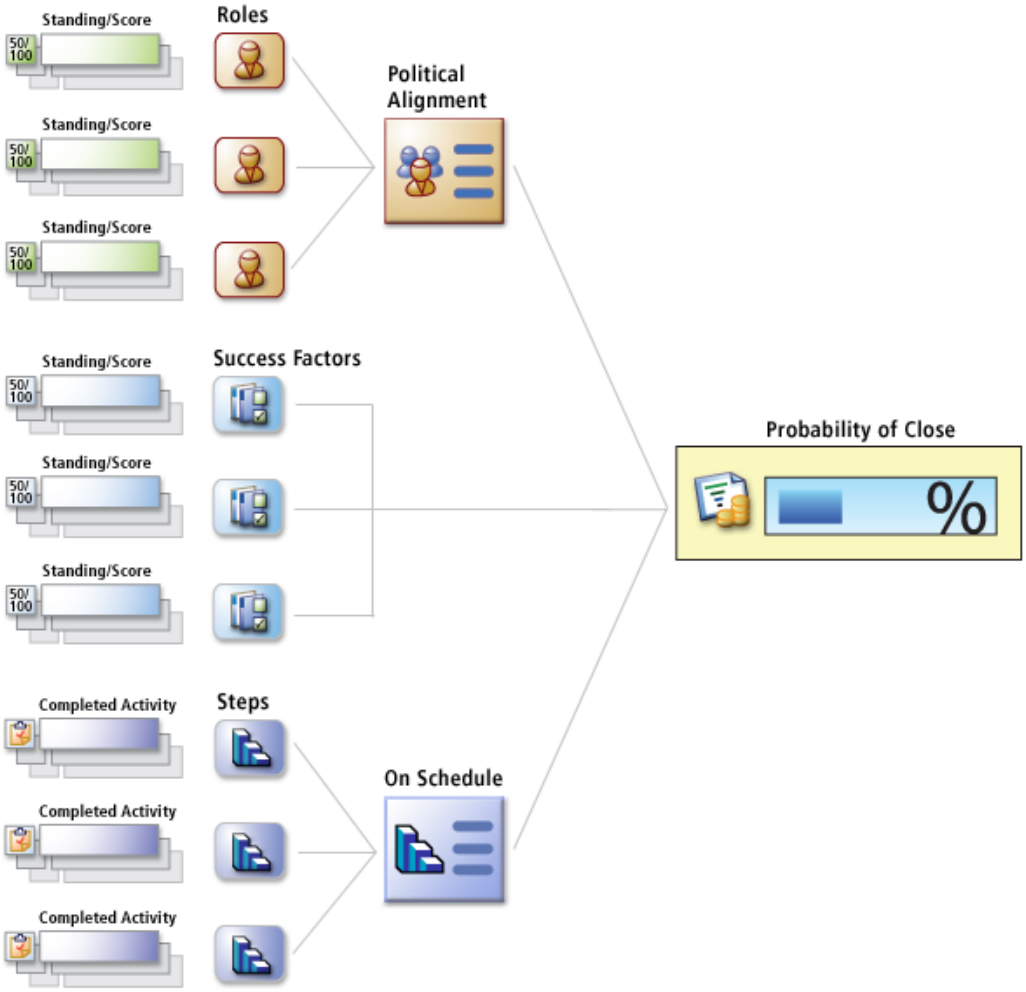
- To mark an activity as complete, click inside the box displayed after the activity. Overdue activities are denoted by a warning symbol after the activity.
- Use the **Show follow-ups** option to display follow-up activities related to an activity within a step.
- Use the **Show completed activities** option to display completed activities. (Otherwise, completed activities are removed from the step.)
- Use the **More** button to add, modify, or delete roles, success factors, steps, and activities or you can use the shortcut menu.



8 Click **OK** to save the changes to the opportunity.

Progress Indicator

The progress indicator for the probability of close is updated based on the weighted sum of the standing/score of the roles and success factors, as well as the number of completed activities within a step. The standings of the roles affect the Political Alignment success factor. The completed activities affect the On Schedule success factor. All success factors contribute to the probability of close.



Multi-Currency

Enabling multi-currency in an Address Book enables users to enter opportunity revenue in other currencies. All other currency fields are displayed in the default currency for the Address Book, otherwise known as the corporate currency. Additional currencies added to the Address Book can be applied to opportunity revenue on a per-entry basis.

Multi-currency is enabled in Administrator. If this functionality is not enabled, all related fields, menu items, and dialog boxes are not visible in Maximizer. Once multi-currency is enabled for an Address Book, it cannot be disabled. The corporate, or default, currency for the Address Book is also set in Administrator. For more information on enabling multi-currency, granting users rights to manage multi-currency, and setting the corporate currency, see the *Maximizer CRM Administrator's Guide*.

The corporate currency acts as the exchange rate baseline for other currencies. The corporate currency always has an exchange rate of 1.0, and other currencies have their own exchange rates. The exchange rates determine the revenue conversion from one currency to another. By default, the corporate currency is US, but this can be changed in Administrator.

Adding Currencies to the Currency Library

Currencies are managed in the Currency Library in Maximizer. When designated users are given the "Allow manage currencies" security right in their user access rights, they can add, modify, and delete currencies in the Address Book.

Once you add a currency, you can use it as the revenue currency for any opportunity entry. The cost fields in the opportunity are always displayed in the corporate currency.

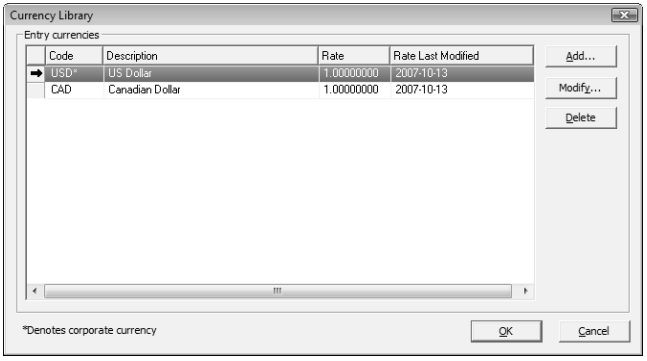
In addition to adding currencies, you can also modify and delete currencies from the currency library using the buttons in the Currency Library dialog box. When you modify an exchange rate for a currency, the new rate is applied only to new opportunities.

The format of currency symbols and ISO codes are determined by settings in your operating system. You can adjust the currency formats from the Control Panel. Any changes to the currency formats are applied immediately to Maximizer currency fields.

➤ To add a currency to the currency library

1. On the **Setup** tab, select **Template Library > Currency Library** from the **File Management** group.

   The Currency Library dialog box opens.



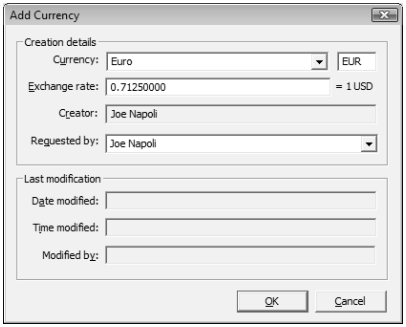
2. Click **Add**.
3. From the **Currency** drop-down list, select a currency.

   The ISO code is entered automatically, but you can change this field or leave it blank if necessary. For example, you may want to use US, rather than USD, for the US Dollar.
4. Enter the currency **Exchange rate**.

   This is the value of the currency in comparison with the corporate currency. By default this is set to 1.

If you change your corporate currency, all currency rates are set to 1.

5. If necessary, from the **Requested by** field, select a user.
6. Click **OK.**



Email Notification for Opportunities

When opportunities are created, modified, abandoned, lost, suspended, or won, email messages can be automatically sent to partners and users notifying them of the changes. Maximizer automatically inserts the basic details of the opportunity in the message so you don't have to write the email message with opportunity details each time.

To set up opportunity email notification, you must create email notification templates in Administrator. You can create separate templates for each action (create, abandon, lost, suspended, or won). Each action can also have separate templates for sending email to partners and users. User notification email is sent to the users identified as monitors for the opportunity.

For detailed information on how to create email templates for opportunity notification, see the *Maximizer CRM Administrator's Guide*.

Selecting Users for Opportunity Monitoring

A default list of opportunity monitors is set up in the opportunity preferences in Administrator. You can select this default list, or you can select any other users to monitor specific opportunities. You can also choose not to monitor a specific opportunity.

All users with modify permissions for opportunities can add or remove opportunity monitors. Opportunity monitoring access rights are not separate from general opportunity rights. If a particular user should not be modifying opportunity monitors, all opportunity modification rights can be removed in Administrator.

Opportunity monitors receive email messages based on templates set up in Administrator. You can create different templates for each type of action. See the *Maximizer CRM Administrator's Guide* for details.

You can also specify how to monitor new opportunities in the default opportunity entry.

➤ To select a user for opportunity monitoring

1. Select or open the opportunity.
2. On the **Edit** tab, select **Opportunity** from the **Monitor** group.

   – or –

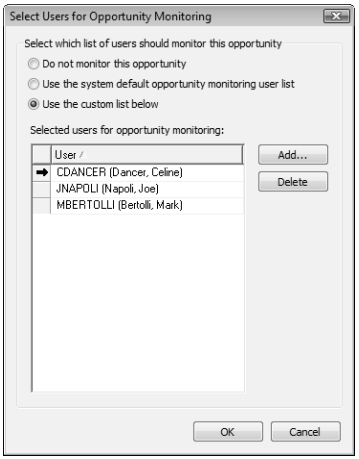
   Right-click and select **Opportunity Monitoring**.

   – or –

   In an open opportunity, select the **Monitoring** icon.

3 Select one of the opportunity monitoring options.

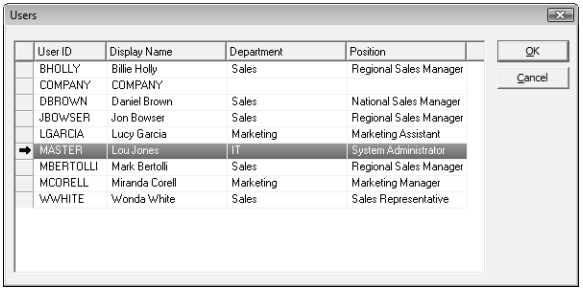
- Select **Do not monitor this opportunity** to remove all users from the list so no user receives email regarding this opportunity.
- Select **Use the system default opportunity monitoring user list** to display the users specified in the system default opportunity monitoring list.
- Select **Use the custom list below** to modify the list of users who monitor the opportunity.



4 If you select to use a custom list for opportunity monitoring, click **Add** to add a user to the list.

The Users dialog box opens displaying the users that are available to add to the list.

5 Select a user and click **OK** to add the user to the list.



6 Click **OK** to save the changes to the opportunity monitoring list.

Opportunity Pipeline Report

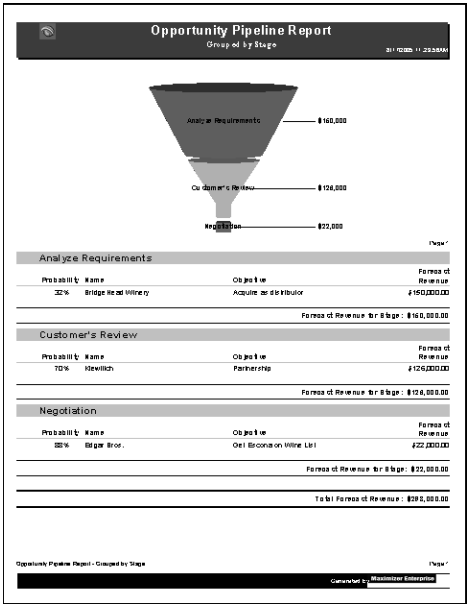
With a single click, you can view the current opportunities in the pipeline. The report graphically displays all opportunities that you select to include grouped by opportunity stage. The Opportunity Pipeline report can also be modified using Crystal Reports.

➤ To view the Opportunity Pipeline report

1. In the Opportunities window, click the **Display Opportunity Pipeline Report** button in the **View** bar.

   You are prompted for which entries to include in the report.

2. Select the entries to include, and click **OK**.



Quotas

You can manage sales quotas for teams, territories, and leaders assigned to opportunities. Sales quotas keep track of the revenue from opportunities compared to the quota applied to the team or leader assigned to the opportunities.

Quotas are available only in Maximizer CRM Enterprise Edition.

Sales managers can create quota templates. And all users with adequate quota permissions can apply quotas to sales teams, territories, and opportunity leaders.

The following sections contain information on working with quotas:

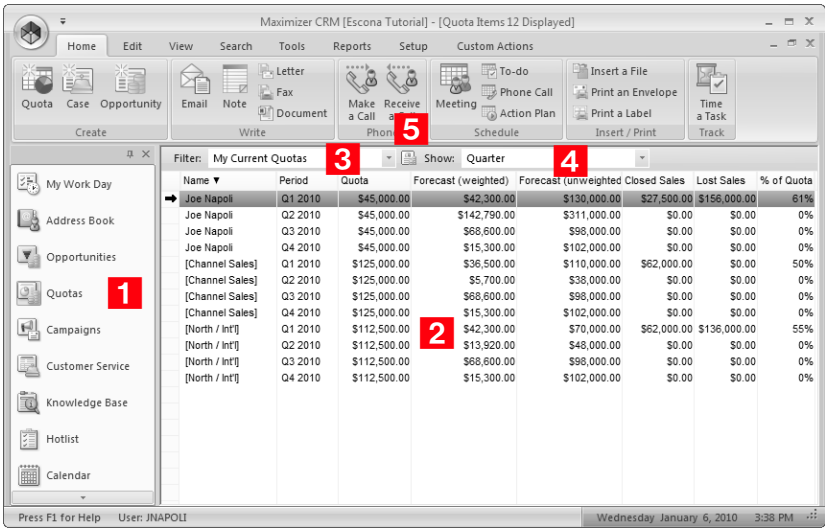
- "Quotas Window" on page 198
- "Creating Quota Templates" on page 199
- "Applying Quotas" on page 200

Quotas Window

You can view your current sales quotas in the Quotas window. Keep the following points in mind when working in the Quotas window:

1. Click the **Quotas** icon to open the Quotas window.
2. In the main area of the window, view the progress of opportunities for users, sales teams, and territories compared to the quotas.
3. Use the **Filter** drop-down list to display all of your quotas, all of your quotas for the current fiscal year, or all quotas that you have the right to view.
4. Use the **Show** drop-down list to display quotas by month, quarter, or year.
5. Select the **Quotas Report** icon to generate a report on the current quotas.

The year shown in the Period column refers to the fiscal year not the actual year. If the fiscal year does not begin in January, the year shown for the months before January refers to the next year, when the fiscal year ends.



Creating Quota Templates

Sales Managers can create quota templates that can be applied to many teams, territories, and leaders.

Maximizer users must have the Sales Manager user role to access quota templates.

➤ To create a quota template

1. On the **Setup** tab, select **Template Library > Quota Templates** from the **File Management** group.
2. Click **Add.**
3. Specify a name for the quota template.
4. In the **Quota** field, enter the total amount of the quota for the fiscal year.
5. In the **Fiscal Year** drop-down list, specify the year that the quota applies to.

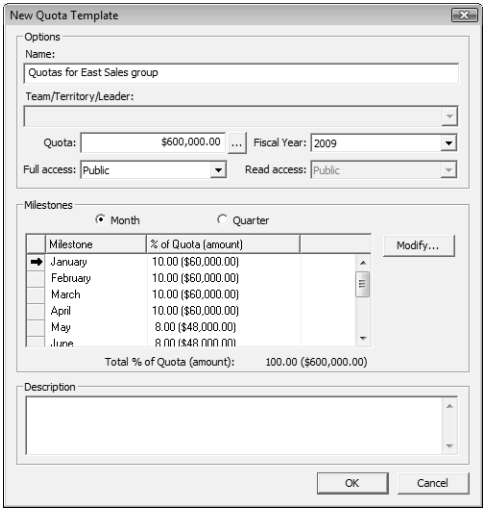
The beginning of the fiscal year is set in Administrator.

6. Under **Milestones**, select **Month** or **Quarter** as the milestones in the fiscal year.

   By default, an equal percentage of the quota is applied to each milestone.
7. To modify the percentage applied to a milestone, select the milestone, click **Modify**, and enter the new percentage.

   If you modify the percentage for one milestone, you must modify all other milestones, so that the percentages add up to 100.

8 Click **OK** to save the quota template.



Applying Quotas

You can apply sales quotas to teams, territories, and leaders. You can apply existing quota templates or create new quotas. Maximizer users must have the Insert permission for Quotas in order to apply quotas.

Only one quota can be applied to a team, territory, or leader for each fiscal year. If you use MaxExchange, ensure that multiple quotas are not applied at different MaxExchange distribution sites to the same team/territory/leader and fiscal year.

➤ To apply a sales quota

1 Select the **Quotas** icon to open the Quotas window.

2 On the **Home** tab select **Quota** from the **Create** group.

– or –

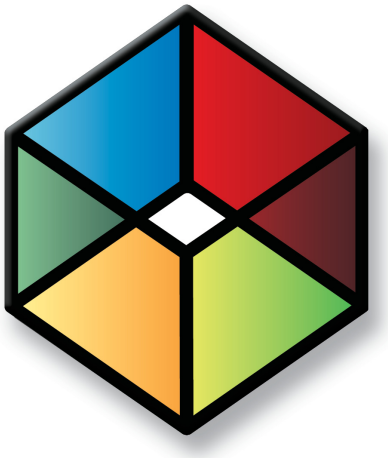
Right-click, and select **Add Quota**.

3 In the **Template name** drop-down list, select a quota template to base the quota on.

4 Select the leader, team, or territory that the quota applies to.

5 If necessary, adjust the other properties of the quota.

6 Click **OK**.



CHAPTER 9

Campaigns

Market Your Products and Services

In this chapter...

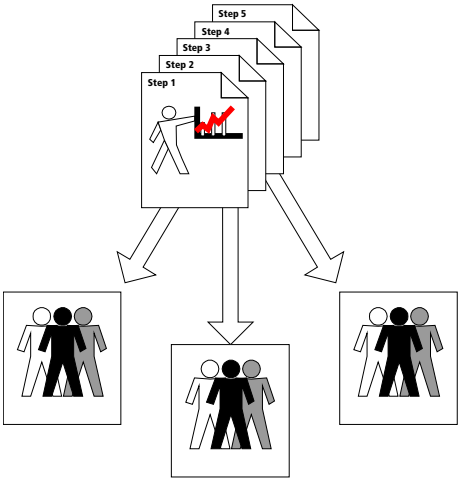
"About Campaigns" on page 202
"Traditional Campaign Templates" on page 206
"Creating Traditional Campaigns" on page 211
"Automated Campaign Templates" on page 218
"Automated Campaign Messages" on page 224
"Adding Automated Campaigns" on page 229
"Activities in Automated Campaigns" on page 235
"Automated Campaign Subscribers" on page 238
"Status of Automated Campaigns" on page 242
"Testing Automated Campaigns" on page 243

About Campaigns

Campaigns help you and your colleagues promote your company and manage complex marketing campaigns.

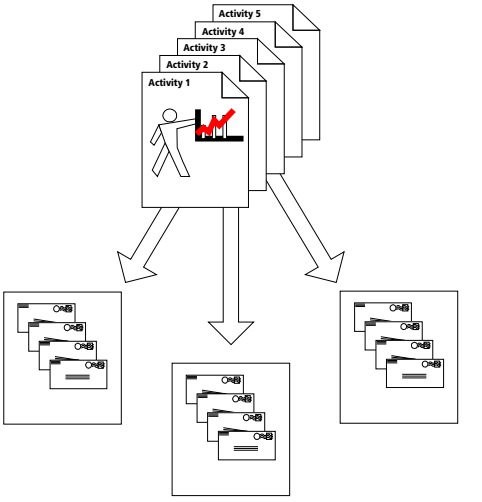
With automated campaigns, you can broadcast your marketing message to anyone in your Address Book. A campaign can reach out to your entire Address Book or to a group of entries by email, fax, or print.

Traditional campaigns allow you to coordinate your marketing team for a common goal—producing an ad in television, radio, or print.



Traditional Campaign Template

A traditional campaign template provides a strategy for your teams that can be reused many times for various marketing campaigns.



Automated Campaign Template

You can send out automated campaign message by email, fax, or printed document. An automated campaign template defines when and what is sent and can be reused for many automated campaigns.

Tracking campaigns helps you define and strengthen your marketing methodology. As a marketing team, you define campaign templates—what you need to do to launch a marketing campaign and how you will address the issues and obstacles involved. Then, you apply the campaign template to your campaign.

The following section contains additional overview information about campaigns:

- "Traditional Campaigns" on page 203
- "Automated Campaigns" on page 203
- "Campaigns Window" on page 204

Traditional Campaigns

Complex marketing campaigns require a well-planned strategy. When you launch a new product or promote your website, for example, you need a coherent plan and you need to coordinate the members of your marketing team towards a common goal. traditional campaigns help you and your team manage your marketing campaigns.

Using traditional campaigns, you can do the following:

- Create traditional campaign templates—detailed plans that identify the factors that influence a marketing campaign and the activities you must perform to complete a campaign.
- Apply these campaign templates to one or more marketing campaigns.
- Effectively schedule and coordinate the marketing process among all members of your marketing team.
- Ensure that all the right people in your organization have up-to-date information about the status of your campaigns.
- Analyze the effectiveness of your campaign templates and create new ones for new campaigns.

The Campaigns window also allows you to record a marketing campaign without a campaign template. Without a campaign template, a campaign simply records the campaign's goal and allows you to assign a marketing team to achieve the goal. No activities or steps are defined to help your team to achieve the goal. You can use this type of campaign for simple marketing campaign objectives.

Automated Campaigns

Use automated campaigns when you want to have Maximizer automatically send out email messages, faxes, or printed documents on a pre-defined schedule. An automated campaign is very useful if you want to inform customers of a new or upgraded product that you are marketing, encourage a repeat visit to your company's website, or even just to keep in contact with the customer.

Fax and print campaigns are available only in Maximizer CRM Enterprise Edition.

You can include merge fields in your outgoing campaign media so all recipients get messages that are customized with their names, companies, or any other fields in their Address Book entry information.

You can "broadcast" email to any number of Address Book entries to support your marketing campaign. Ask your Internet Service Provider if there is a limit on how many email messages that can be sent concurrently. You can control the cycle time check in the automated services preferences in Administrator. (Select File > Preferences, and select the Automated Services tab.)

Automated services are not available for MaxExchange Remotes.

There are two main types of automated campaigns:

- **Fixed-Date –** These campaigns run for a specified time period. When you apply this type of campaign to a new Address Book entry, all activities of the campaign are applied within the fixed time period. For example, if you launched a campaign comprising five activities, and the first two activities were already completed when a new Address Book entry is added to the campaign, these two activities are applied immediately. The remaining activities are applied as scheduled.
- **Ongoing –** These campaigns repeat indefinitely unless you change the status to suspended. You can add a new Address Book entry at any time during the campaign cycle. When a new Address Book entry is added, the entire campaign is run from start to finish, at the set time intervals. For example, if there is a duration of one week between a set of four email messages, each message will be sent one week apart, regardless of when an Address Book entry is added to the campaign.

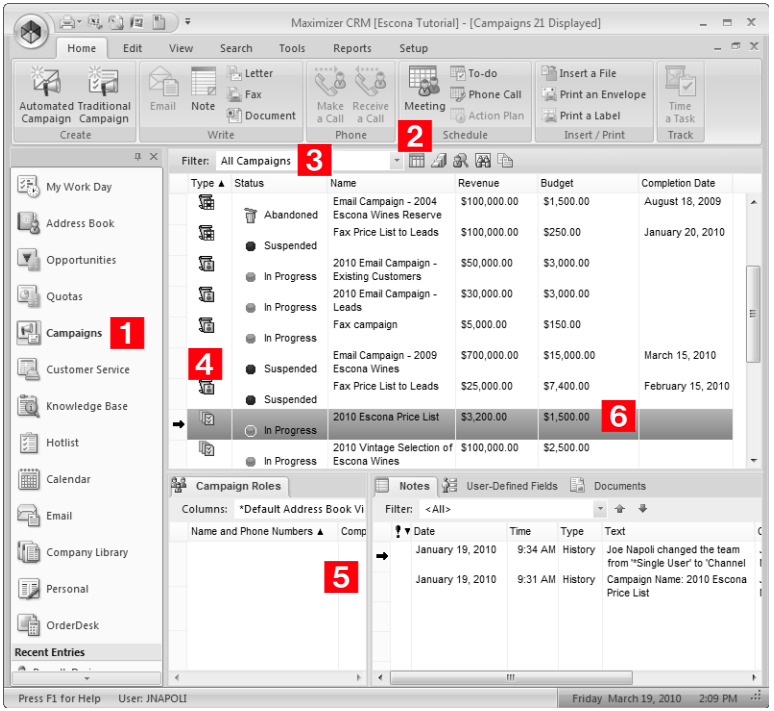
Campaigns Window

You can work with your campaigns in the Campaigns window. Like the other main windows, the Campaigns window is list-based, which means your entries are displayed as items in a list. All of your campaign-related activities are done in the Campaigns window.

Here are some tips for working in the Campaigns window:

1. Select the **Campaigns** icon to open the Campaigns window.
2. Click the **Column Setup** icon to select a column setup and change the information displayed about each campaign.
3. Use the **Filter** drop-down list to filter the list of campaigns.
4. Use the icons in the **Type** column to quickly distinguish automated campaigns from traditional campaigns.
5. The tabbed following windows show additional information for the selected entry. Note that the Campaign Roles following window applies only to traditional campaigns.

6 Double-click on a campaign to open it.



Traditional Campaign Templates

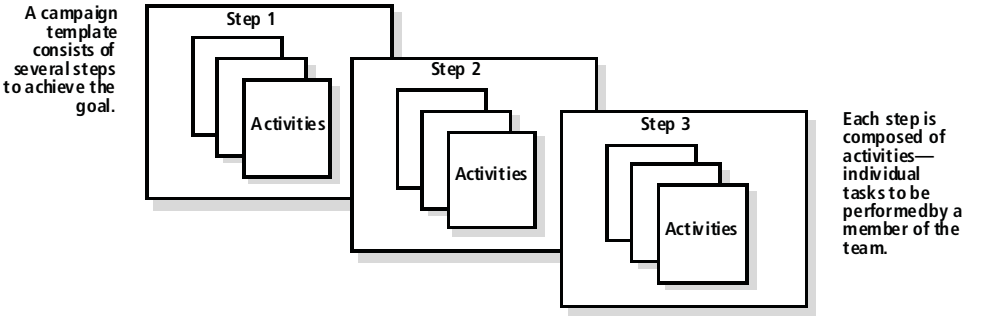
Traditional campaigns allow you to launch structured marketing campaigns in a marketing team environment. A new traditional campaigns is created using one of the campaign templates in the Traditional Campaign Template Library. Campaign templates are approaches your organization uses in a marketing campaign.

A campaign template is a detailed plan that defines the procedures that contribute to a successful marketing campaign. A traditional campaign template is composed of steps, which are in turn composed of scheduled activities. For example, you could create a simple campaign template that defines the steps, activities, and roles required to place an ad in a magazine

Once you create a campaign template in the Traditional Campaign Template Library, you can apply the campaign template's particular marketing plan to any new traditional campaign you create.

Before you can enter your organization's marketing strategies as campaign templates, you need to gather information from your marketing people. The best campaign templates combine the knowledge and experience of everyone in your organization; therefore, you should involve as many people in this process as possible. The result will be a pattern of success that you can follow like a road map.

Your first step is to design a general plan—a campaign template—that describes your company's steps, activities, and roles involved in completing the campaign. The most difficult step in creating a new campaign template is in the planning stage. Once you know what the steps, activities, and roles will be, you may then enter the information in the Traditional Campaign Template Library.


A campaign template consists of several steps to achieve the goal.
Step 1
Activities
Step 2
Activities
Step 3
Activities
Each step is composed of activities—individual tasks to be performedby a member of the team.

The following sections contain additional information on traditional campaign templates:

- "Components of Traditional Campaigns" on page 207
- "Example of a Traditional Campaign" on page 208
- "Creating Traditional Campaign Templates" on page 209

Components of Traditional Campaigns

Traditional campaigns and traditional campaign templates consist of the following components:

- **Steps –** Steps are milestones in the campaign that reflect actions you should take when pursuing a campaign. Each step represents one or more activities. One of the steps for placing an ad in a magazine might be to contact the magazine's advertising department to buy the ad space.
- **Activities –** Activities are actions that form the smallest building block in a campaign. Once a step is started, each activity is turned into a scheduled Hotlist task in Maximizer. An activity in contacting the magazine's advertising department, for example, might be to make the initial phone call to get pricing information.
- **Roles –** Roles are the known influences caused by people that affect the probability of marketing your product or service. For placing an ad, one of the roles would be your contact person at the magazine's advertising department.

Steps and Activities in Traditional Campaigns

Some steps may be so simple that there is no need to break them down further. In most cases, however, you will find it easier to develop a campaign template that works if you first define the major steps and then break down each step into a series of activities that you can schedule and assign to marketing team members.

Each activity is assigned to a single user or delegated to a team member as a Hotlist task. As the team members mark activities as complete, Maximizer updates the status of the campaign accordingly.

The Traditional Campaign Template Library requires you to define activities separately from steps. This allows you to use an activity in several different steps. When you assign activities to a step, you simply select them from the list of available activities.

Roles in Traditional Campaigns

The next step in developing your campaign template is to determine the key roles—positions assumed by key people that will directly influence the outcome of a marketing campaign.

When you are defining a traditional campaign template, you don't necessarily know who will fill these roles for each campaign. If you can define generic roles for your campaign templates—for instance, Printer or Graphic Artist—you can later use people's names for those generic roles for individual campaigns.

Example of a Traditional Campaign

The following is an example of a campaign template for placing an ad in a magazine.

Ad for Magazine

Cost: $17,700.00 Duration: 2.47 week(s)

Objective: To create new ad for a trade publication

Steps

Develop new advertising campaign

Cost: $4,500.00 Duration: 1.19 week(s)

Develop new advertising campaign

Follow-up program

Cost: $1,200.00 Duration: 4.00 day(s)

Organize necessary follow-up for marketing program

Activities - Develop new advertising campaign

Identify appropriate advertisers

Identify trade publications and magazines suited for print advertising

Cost: $2,000.00 Effort: 1.14 week(s) Priority:

With: Advertising Agency

Submit ads for the season

Submit completed print ads to all advertisers being used

Cost: $2,000.00 Effort: 5.00 hour(s) Priority:

With: Advertising Agency

Brainstorming

Brainstorming with entire marketing team and agency for new ideas and new offers for the upcoming season

Cost: $500.00 Effort: 3.00 hour(s) Priority:

With: Advertising Agency

Activities - Follow-up program

Telemarketing campaign

Develop a telemarketing campaign for the marketing program

Cost: $200.00 Effort: 2.00 day(s) Priority:

Identify target market

Compile list of geographic territories of high income 30–55 yrs & identify retailers in the area

Cost: $1,000.00 Effort: 2.00 day(s) Priority:

With: Advertising Agency

Roles

Advertising Agency

Printer

Creating Traditional Campaign Templates

Once you have planned your traditional campaign template, you can easily enter it into the Campaigns window. The Traditional Campaign Template Library is a tabbed dialog box in which you can create a library of steps, activities, and roles. You then use these elements when you add a traditional campaign template to the library.

In the Traditional Campaign Template Library, you add all of the components of the campaign, start with the Roles tab and finishing with the Steps tab. Then, you construct the campaign template in the Templates tab, pulling together the various components into one template.

After you have designed a traditional campaign template, you can then apply it to any new traditional campaign that you create.

➤ To create a traditional campaign template

1. On the **Setup** tab, select **Template Libraries > Traditional Campaign Templates** from the **File Management** group.
2. Click **Add** and enter a name for the template.

   Use the other buttons to copy (Save As), rename, or delete campaign templates.

ⓘ The Save As button in each tab lets you save the selected campaign template or element under a new name. This can be useful if you want a new campaign template (or template element) but you don't want to create it from scratch.

3. Fill in the general description for the campaign template.

   The cost and duration are automatically calculated from the cost and effort of the activities.
4. In each tab, construct the different template elements in the campaign.
   - In the **Roles** tab, enter the roles in the campaign.
   - In the **Activities** tab, enter the activities in the campaign.

     You can assign each activity to an existing role.
   - In the **Steps** tab, enter the steps in the campaign.

     You can assign existing activities to the steps.

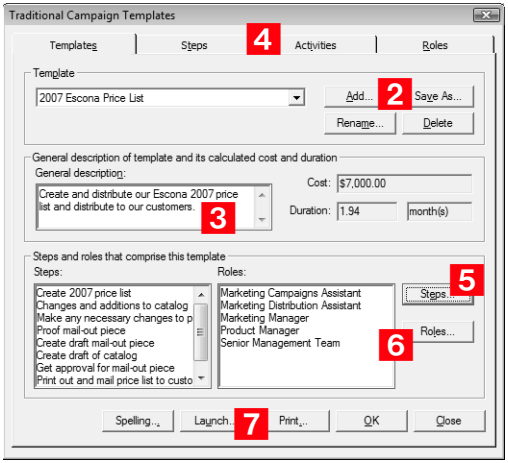
5 In the **Templates** tab, click **Steps**, and assign the steps to your new campaign template.

6 Click **Roles**, and assign the roles to the campaign templates.

7 Click **Launch** to create a traditional campaign based on this template.

– or –

Click **OK** to save the campaign template to use later.



Creating Traditional Campaigns

If you have planned and correctly entered your traditional campaign template, it's easy to implement a traditional campaign.

You can also create a campaign without using a campaign template. When creating the campaign, specify "Not using a campaign template" in the Template tab.

After creating the campaign, you can begin working the campaign at any time.

➤ To create a traditional campaign

1. In the Campaigns window, on the **Home** tab, select **Traditional Campaign** from the **Create** group.

   – or –

   In the Campaigns window, right-click select **Add Traditional Campaign**.

   – or –

   After creating a traditional campaign template in the Traditional Campaign Templates dialog box, click the **Launch** button on the Templates tab.

2. Enter the details for the campaign working your way through the tabs from left to right.

   - Enter the campaign's potential revenue.

     The budget is automatically calculated from the total cost of the activities (part of steps) in the campaign.

   - Assign the marketing team and leader.

     You can have different team members for each campaign.

     This assignment determines where the campaigns are synchronized if you are using MaxExchange.

   - On the **Templates** tab, select a pre-defined template, which includes a selection of roles and steps for a campaign.

     After assigning a template, you cannot modify the campaign to use a different template.

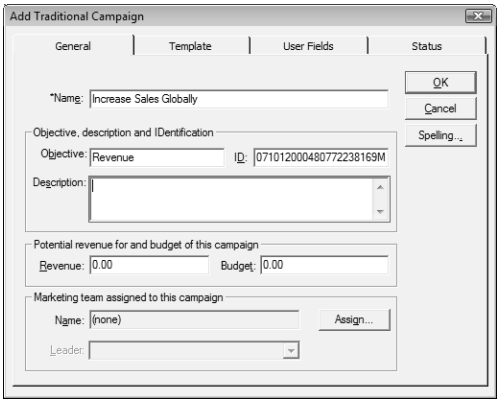
   - In the **User-Defined Fields** tab, specify values for user-defined fields that are specific to campaigns.

The ID number uniquely identifies a campaign. Your system administrator uses Administrator to control whether or not ID numbers are automatically generated.

In order for campaigns to be synchronized with MaxExchange, the campaign must belong to a team.

When a campaign is created, the status is automatically marked as In Progress. You update this when the status is changed.

3 Click **OK** to save the campaign.



Marketing Teams in Traditional Campaigns

Marketing teams allow you to delegate individual campaign activities to members of the team. These activities appear in the team member's Hotlist to be completed by the scheduled date. Marketing and sales teams are set up in Administrator. For more information on setting up teams, see the *Maximizer CRM Administrator's Guide*.

Members of Marketing Teams

A marketing team is composed of three types of members: a team leader, a team member, and a team member with edit rights.

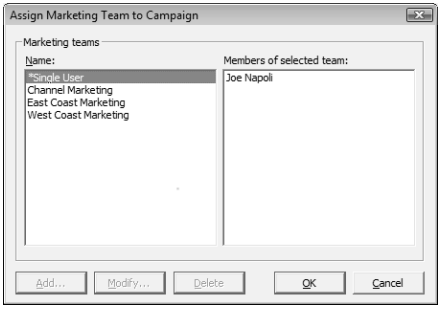
- **Team Leader –** In a team, one person is designated as a team leader who has the right to make changes to the campaign as well as to the campaign's team.
- **Team Member –** A regular team member does not have the right to change the campaign nor the team. The member's role is to perform the tasks the team leader assigns.
- **Team Member with Edit Rights –** A team leader can grant any member the right to edit the campaign, which essentially gives the same abilities of the team leader. This right must be granted on a per-campaign basis, unless your system administrator specifies otherwise.

Assigning Marketing Teams to Traditional Campaigns

Use the Assign button on the campaign's General tab to assign a traditional campaign to any marketing team that has been set up by your system administrator. If a traditional campaign does not have a marketing team assigned, the user who created the campaign is automatically designated as the leader.

➤ To assign a marketing team to a traditional campaign

1. Open the traditional campaign.
2. In the General tab, click **Assign**.
3. Select the team and click **OK**.



Assigning Contacts to Campaign Roles

Before delegating campaign activities to team members and roles, select the traditional campaign and then assign Contacts to your campaign roles.

You can share the same roles among all your campaigns. However, when you assign a Contact to a role, it only applies to the selected campaign.

Note that roles apply to only traditional campaigns using campaign templates.

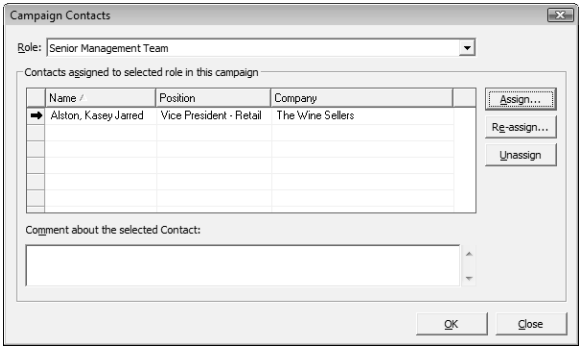
➤ To assign a Contact to a campaign role

1. Select the traditional campaign.
2. On the **View** tab, select **Roles** from the **Review** group.

   – or –

   In the **View** bar, select the **Review Roles** icon.

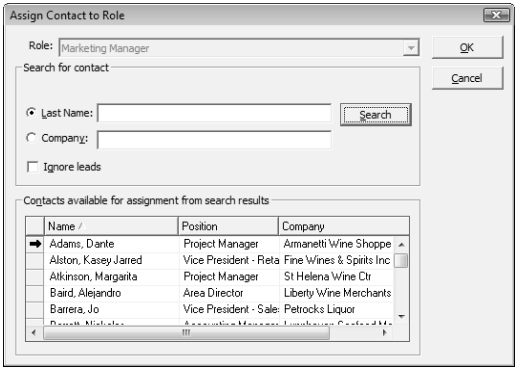
3 Select the role you want to delegate and click **Assign**.



4 Search your Address Book for the desired Contact.

5 Select the Contact you are assigning to the role and click **OK**.

6 Click **OK** again when you are finished assigning campaign roles.



Delegating Campaign Activities to Team Members and Roles

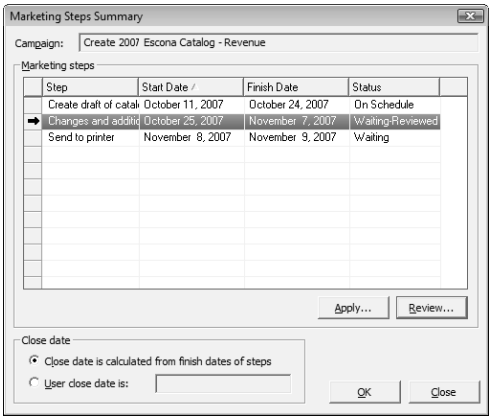
If you are working with a marketing team on a traditional campaign, and you are a team leader or a member with edit rights, you have the ability to delegate the campaign's activities to individual members in the team. You can modify the team's membership or member's rights at any time.

You may have some activities in your campaign that are appropriate for team members with particular skills. The editing of an agreement document, for example, might fall to your writer.

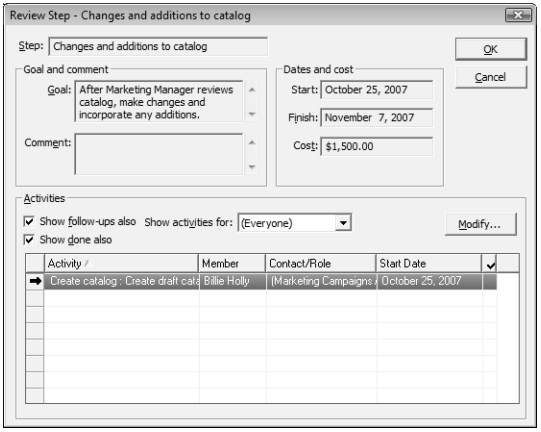
In addition to assigning activities to marketing team members, you also can schedule roles and Contacts for each activity. But first, assign a Contact to each campaign role.

➤ To assign a campaign activity to a team member

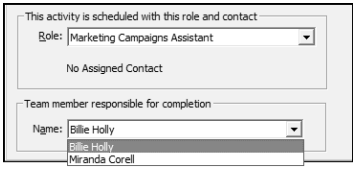
1. Select the traditional campaign.
2. On the **View** tab, select **Steps** from the **Review** group.
3. Select the step that contains the activity you want to delegate, and click **Review**.



4. Double-click the activity you want to delegate.



5. Select the team member to whom you are assigning the activity, and select the role and Contact with which the activity is scheduled, and click **OK** to save the change.


This activity is scheduled with this role and contact
Role: Marketing Campaigns Assistant
No Assigned Contact
Team member responsible for completion
Name: Billie Holly
Billie Holly
Miranda Corell

6 Click **OK** to close the step.

Applying and Working the Steps in Traditional Campaigns

After you have delegated the activities to team members and Contacts, you can begin working through the steps of your campaign and marking each Hotlist task as complete.

➤ To apply and work the steps in a traditional campaign

1 Select the traditional campaign.

2 On the **View** bar, select the **Marketing Steps Summary** icon.

– or –

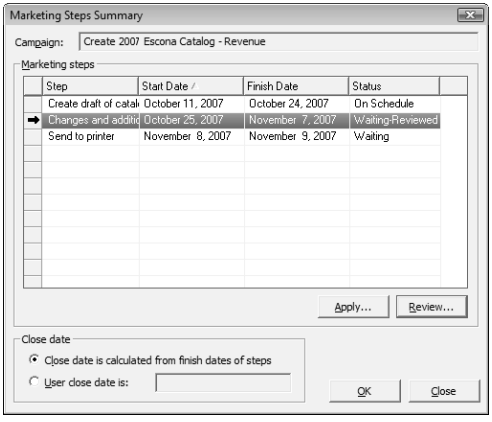
On the **View** tab, select **Steps** from the **Review** group.

3 Select the step, click **Apply**, and specify the start date of the step.

Activities appear in the Hotlist as soon as the step is applied.

4 After applying a step, double-click the step or click **Work**.

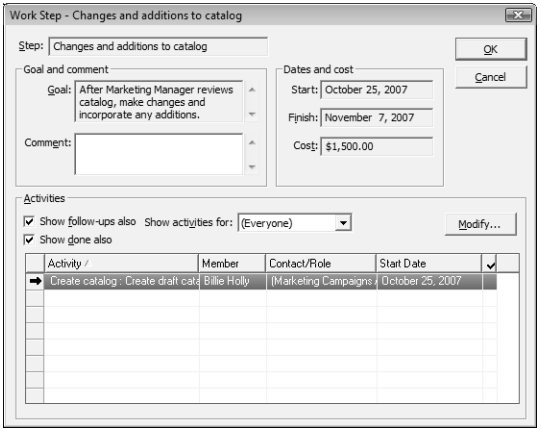
The Work button is not available until you have applied the step



5. Select an activity and click **Modify** to change or delegate an activity.

6. Double-click the last column of an activity to mark the activity as complete.

   You may also mark the task as complete in your Hotlist.



7. Click **OK** to close the Work Step dialog box.

8. Click **OK** again to close the Marketing Steps Summary dialog box.

Pausing Traditional Campaigns

Sometimes you need to suspend your efforts in a marketing campaign due to changing conditions or other factors. You can pause a traditional campaign from the Status tab of an open campaign. Once the campaign is paused, any Hotlist tasks are archived (not available from the Hotlist) until you reset the campaign to "In Progress".

➤ To pause a traditional campaign

1. Open the traditional campaign, and select the **Status** tab.

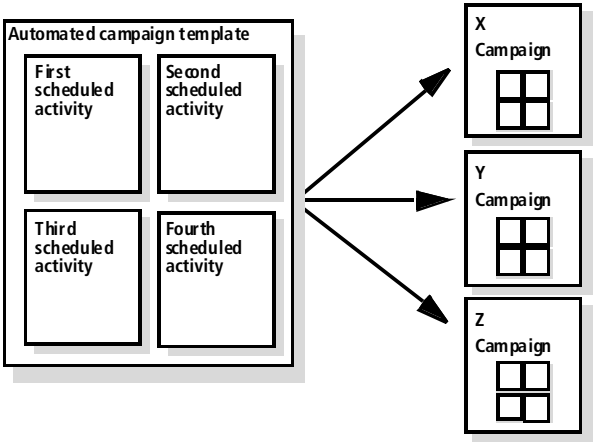
2. Under **Current working status**, select **Suspended**, enter a reason and comment.

3. Click **OK** to save the change to the campaign.

Automated Campaign Templates

Creating automated campaigns requires that you first define campaign templates. Automated campaign templates define the actions that occur when you implement a campaign. Each template contains a series of scheduled activities that must be performed in order to complete the automated campaign.

You can think of a campaign as a single implementation of one of your automated campaign templates. Each time you create an automated campaign, you are applying an instance of an automated campaign template. The same automated campaign template can be implemented over and over in the form of several campaigns.



The following sections contain additional information on automated campaign templates:

- "Activities in Automated Campaign Templates" on page 219
- "Creating Automated Campaign Templates" on page 219
- "Adding Activities to Automated Campaign Templates" on page 221

Activities in Automated Campaign Templates

An automated campaign template determines the actions that occur during a campaign. The campaign template sets out in precise terms which activities to use and when to send the campaign media (email, fax, or printed document). You can schedule as many activities in a campaign template as you need.

When adding activities to a campaign template, you will need to plan some details ahead of time, including the following:

- How many email messages, faxes, or printed documents you want to send.
- Which file types to use for the campaign activity.
- How many days after the campaign is launched that the campaign message is sent.

Creating Automated Campaign Templates

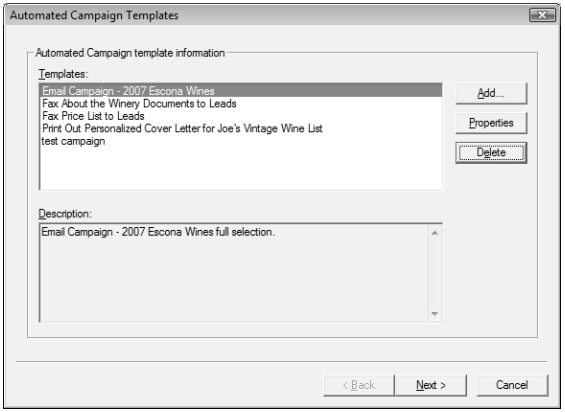
Once you have a plan worked out, you can create an automated campaign template in the Automated Campaign Template Library.

➤ To create an automated campaign template

1. On the **Setup** tab, select **Template Library > Automated Campaign Templates** from the **File Management** group.

   The Automated Campaign Templates dialog box opens.

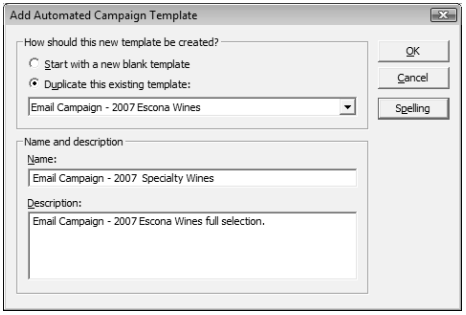
2. Click **Add** to add a new template.



3. Choose whether you are creating an entirely new campaign template or one that is based on an existing campaign template.

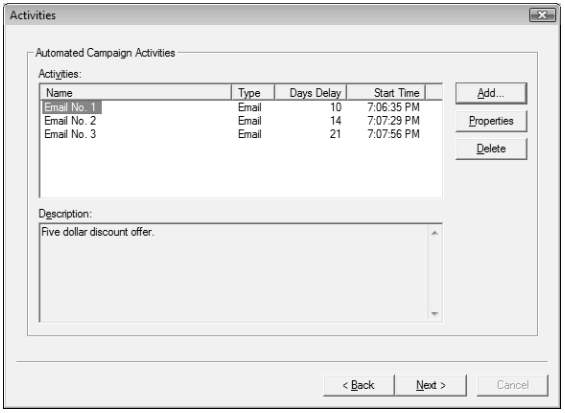
If you choose to base the new campaign template on an existing campaign template, Maximizer copies the content of the existing campaign template into your new campaign template.

4 Type a name and description for the new campaign template and click **OK**. Then, click **Next**.



5 In the Activities wizard page, use the **Add**, **Properties**, and **Delete** buttons to define the series of activities that comprise this template.

When adding activities, you are prompted to specify the type of activity—email, fax, or print.



6 When you are finished defining activities, click **Next**.

7 If you want to immediately launch an automated campaign based on the template, select the **Launch a new campaign based on this template** option.

8 Click **Finish** to save the template.

Adding Activities to Automated Campaign Templates

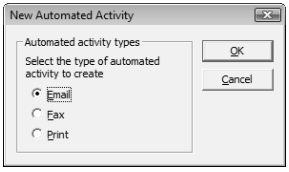
An activity is an email message, a fax, or a printed document that is sent out a certain number of days after an automated campaign is launched using a campaign template. You can add as many activities as you want.

Fax and print campaign activities are available only in Maximizer CRM Enterprise Edition.

➤ To add an activity to an automated campaign template

1. On the **Setup** tab, select **Template Library > Automated Campaign Templates** from the **File Management** group.
2. Select the automated campaign template to which you want add the activity, and click **Next**.

   The Activities wizard page opens.
3. Click **Add**, and select the type of activity—**Email**, **Fax**, or **Print**.



   The Add Email/Fax/Print Activity dialog box opens.
4. Enter the details of the activity.
   - Enter the **Name** and **Description**.
   - For fax and print campaigns, select a **printer**.

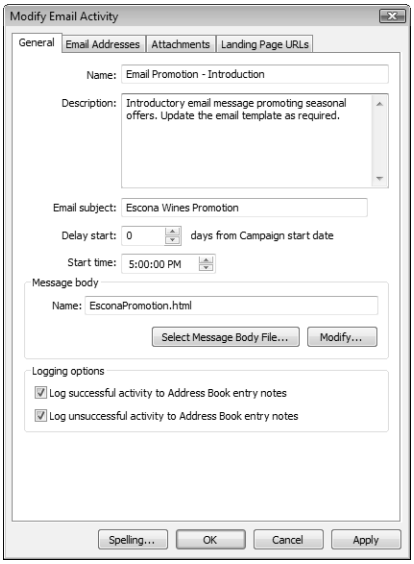
     The list includes all printers and fax applications installed on the Maximizer Automated Services computer (Maximizer server) that are initialized for the fax/print service through Administrator.
   - For email activities, enter an **Email subject**.

     You can click the ellipsis button to insert a merge field in the email subject.
   - Enter the delayed **start date**, which defines the number of days after the campaign template is launched that the activity occurs.
   - Specify the **start time**, which defines the time of day the activity occurs.
   - Click **Select Message Body File** to access the list of saved templates (body files).

New email activities can include Maximizer documents (.ETF files) or .HTML files. Fax and print activities can include Maximizer documents or Microsoft Word documents (.DOC file). Message body templates are stored in the Address Book (database), so everyone can access them from the library.

- Choose your **Logging options**.

  A note is created for the Address Book entries involved in the campaign if the campaign activity is successful or if the activity fails.



5 If you are adding a print or fax activity, click **OK** and continue through the campaign template wizard to finish adding the activity to the campaign template.

If you are adding an email activity, continue with the remaining steps.

6 Select the **Email Addresses** tab, and specify the email addresses associated with the message.

- The **sender's** name and email address are visible in the email message.
- The **reply to** name and address are used when email recipients reply to the email message.
- The **Cc** and **Bcc** fields define a carbon copy or blind carbon copy recipient. Use these options to send a copy of the email message to someone in your company, as well as to the targeted recipients.
- Use the **Include in all the emails** or **Include in the first email only** options to specify that the cc and bcc recipients receive the message for each Address Book entry or for just the first Address Book entry in a batch.

7. Select the **Attachments** tab and click **Add** to add any attachments to the email message.

8. Select the **Landing Page URLs** tab, and specify up to five landing page URLs in the email message.

   If you include a Campaign_Redirect_URL merge field in your email message template, customers are redirected to a landing page URL when they click on the Campaign_Redirect_URL merge field.

9. Click **OK** and continue through the campaign template wizard to finish adding the email activity to the automated campaign template.

Automated Campaign Messages

The principal action of an automated campaign is to send a message to one or more recipients by email, fax, or printed document. When you create automated campaign templates, you choose a message for each activity. You can also add messages to new activities in existing automated campaigns.

These messages are stored in the Message Body Library, accessible from the Automated Campaign Template Library, and from an activity in an existing automated campaign. You can create campaign messages using the Campaign Message Editor (.HTML files), the Maximizer Word Processor (.ETF text files), a text editor (.TXT text files), an HTML editor (.HTML files), or Microsoft Word (.DOC files).

For email activities, Maximizer is capable of sending text and HTML email messages, in addition to the email template file (.ETF) format created by the Maximizer Word Processor. You can create HTML files in Maximizer, or you can use an editor of your choice to create HTML or text files. You can choose to use your default HTML editor in the system default preferences.

Email messages can contain merge fields that are replaced with the recipients' information when the email message is sent. For example, your template's salutation might be "Dear {Mr_Ms?} {Last_Name?}" or "Dear {First_Name?}". These merge fields are replaced with a Contact's name, as in "Dear Ms. Kaworski".

The following sections contain additional information about automated campaign messages:

- "Creating Campaign Messages" on page 225
- "Campaign Message Editor" on page 226
- "Campaign Merge Fields" on page 227
- "Example of a Campaign Email Message" on page 228

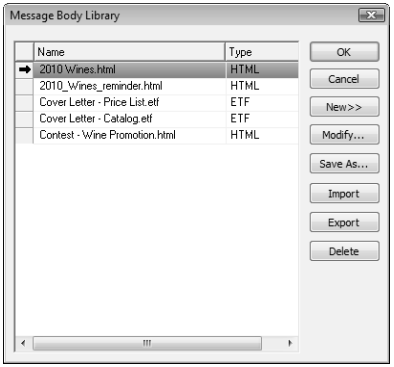
Creating Campaign Messages

You can create email messages for your automated campaigns using the Campaign Message Editor or the Maximizer Word Processor in Maximizer or using an external HTML editor. You can create fax and print messages using the Maximizer Word Processor or Microsoft Word. You can create a new message while adding or modifying campaign activities in existing campaigns or in campaign templates.

➤ To create a campaign message

1. In the General tab of the Activity dialog box in a campaign or campaign template, click **Select Message Body File**.

   The Message Body Library dialog box opens displaying all existing campaign messages.



2. Click **New** and select **Maximizer Template**, **HTML Template**, or **Microsoft Word Template**.

   If you select Maximizer Template in an email message, you can send the message only as a plain text file without formatting.

3. Enter the name of the template and click **OK**.

   If you are creating a Maximizer template, the Maximizer Word Processor opens.

   If you are creating an HTML template the Campaign Message Editor or your default HTML editor opens.

   If you are creating a Microsoft Word Template, Microsoft Word opens.

4. Compose the content of the message in the editor.

   If you are using the Maximizer Word Processor or the Campaign Message Editor, click the **Insert Merge Field** icon to add merge fields to the message.

5 In the Maximizer Word Processor or in an external editor, save the message and close the editor.

– or –

In the Campaign Message Editor, click **OK** to save the message and close the editor.

Campaign Message Editor

You can use the Campaign Message Editor to create email messages for your automated campaign email activities.

The Campaign Message Editor lets you create messages in HTML format. You can add merge fields, formatting, images, and hyperlinks to the email message. You can also edit the HTML source of the message.

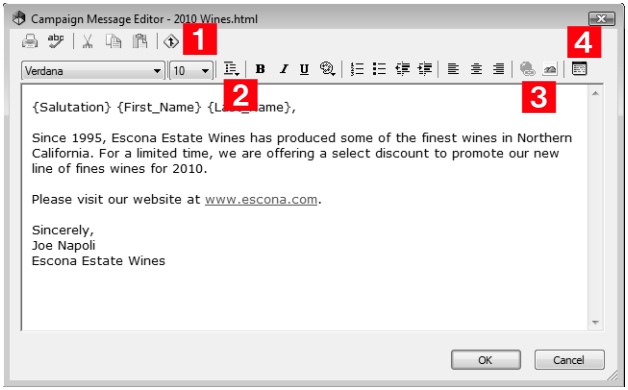
Keep the following tips in mind when working in the Campaign Message Editor:

1 Select the **Insert Fields** icon to add merge fields to the message.

2 Use the toolbar to apply formatting to the content of the email message.

3 Select the **Picture** and **Hyperlink** icons to insert images and hyperlinks in your message.

4 Select the **View Source** icon to view and edit the HTML source of the email message.


Campaign Message Editor - 2010 Wines.html
1
2
3
4
Verdana
10
{Salutation} {First_Name} {L ame},
Since 1995, Escona Estate Wines has produced some of the finest wines in Northern California. For a limited time, we are offering a select discount to promote our new line of fines wines for 2010.
Please visit our website at www.escona.com.
Sincerely,
Joe Napoli
Escona Estate Wines
OK
Cancel

Campaign Merge Fields

The campaign merge fields are specific to automated campaigns. These merge fields can be extremely useful for tracking customer information regarding resulting visits to your website and opened campaign email.

The easiest way to use merge fields in HTML is to create an email template using the Campaign Message Editor and to insert the merge fields into the content of the HTML file using the Insert Merge Field toolbar icon. You can also add the syntax for the merge fields to files created with external HTML editors.

Although some of these merge fields can be used in .ETF and .TXT files, they are best suited for HTML.

- **Campaign_Opened_Email_Tracking_URL –** This merge field tracks the number of customers that have opened an automated campaign email message. It can be used with only HTML message templates. When a customer opens a campaign email message, the email opened count is updated in the automated campaign statistics.

  You should add the syntax for this merge field to an image tag in your HTML message.

- **Campaign_Redirect_URL –** This merge field tracks how many customers hit your website as a result of an automated campaign email message. The redirect URL calls an ASP page, which is installed and configured at the time of installing Maximizer. If necessary, the redirect script location can be modified in Administrator. When a customer clicks on the link, the URL visited count is updated.

  You can add up to five redirect URL merge fields to your campaign messages. You should add the syntax for this merge field to a hyperlink in your HTML message. You specify the actual URL of the web page directly in the campaign template.

- **Campaign_Remove_Subscriber_URL –** This merge field unsubscribes customers from an automated email campaign. When a customer clicks on this URL, the Do Not Solicit By field is updated for the entry, so the customer's entry is marked to not be solicited by email.

  You should add this merge field to a hyperlink in your HTML message.

- **Service_Computer_Name –** This merge field identifies the automated services computer (Maximizer server) from which the automated email message was sent. Typically, you could use this internally through a hidden tag in your HTML. This field would be useful when you have more than one automated services computer running campaigns.

Example of a Campaign Email Message

In this example, an email message will be sent to notify the recipients of a product discount. The message template uses the four automated campaign merge fields.

```
<HTML>
<body>
<img src="{Campaign_Opened_Email_Tracking_URL?}">
<p>Since 1995, Escona Estate Wines has produced some of the finest wines in Northern California. We invite you to try our wines. For a limited time, we are offering a select discount to promote our new line of fine wines for 2010.
<p>Please wisit our website at <a href="{Campaign_Redirect_URL?}>Landing Page</a>.
<p>To unsubscribe from this campaign, please <a href="{Campaign_Remove_Subscriber_URL?}">click here</a>
<p>You are receiving email from this Service Computer, {Service_Computer_Name?}.
</body>
</HTML>
```

Adding Automated Campaigns

Automated campaigns are implementations of automated campaign templates. You can add as many campaigns as you like using the same campaign template and manage them in the Campaigns window.

An automated campaign is always associated with one or more Address Book entries—the Address Book entries are the recipients of the messages sent in the campaign. Before you attempt to launch an automated campaign, you must select the Address Book entry recipients.

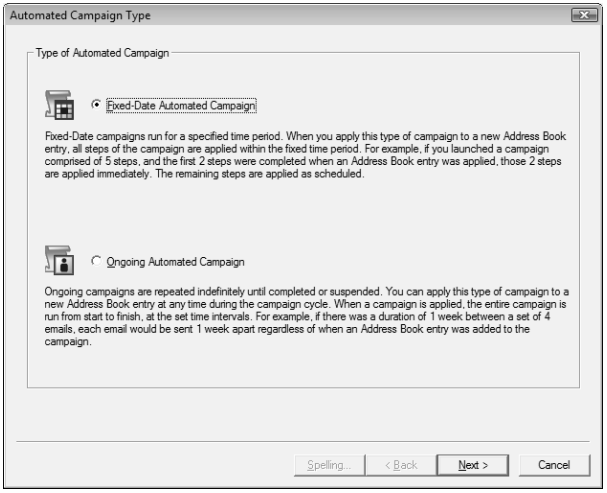
➤ To add an automated campaign

1. In the Campaigns window, on the **Home** tab, select **Automated Campaign** from the **Create** group.

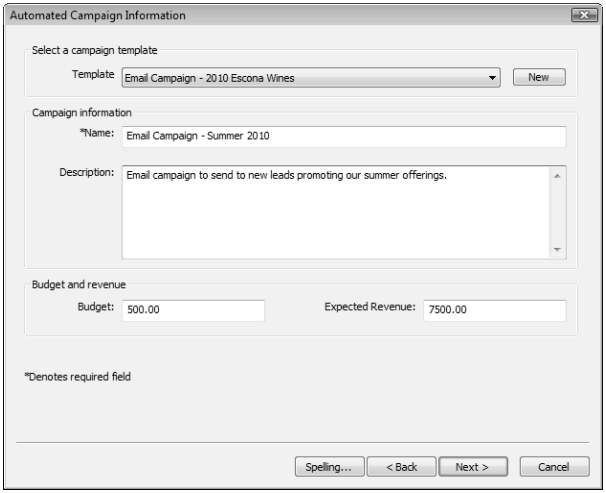
   – or –

   Right-click in the Campaigns window and select **Add Automated Campaign**.

2. Choose the type of campaign you want to create—**Fixed-Date** or **Ongoing** and click **Next**.

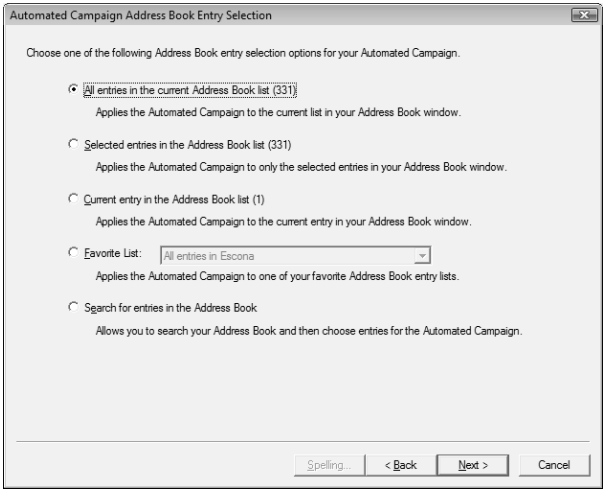

Automated Campaign Type
Type of Automated Campaign
Fixed-Date Automated Campaign
Fixed-Date campaigns run for a specified time period. When you apply this type of campaign to a new Address Book entry, all steps of the campaign are applied within the fixed time period. For example, if you launched a campaign comprised of 5 steps, and the first 2 steps were completed when an Address Book entry was applied, those 2 steps are applied immediately. The remaining steps are applied as scheduled.
Ongoing Automated Campaign
Ongoing campaigns are repeated indefinitely until completed or suspended. You can apply this type of campaign to a new Address Book entry at any time during the campaign cycle. When a campaign is applied, the entire campaign is run from start to finish, at the set time intervals. For example, if there was a duration of 1 week between a set of 4 emails, each email would be sent 1 week apart regardless of when an Address Book entry was added to the campaign.
Spelling...
< Back
Next >
Cancel

3. Select the **template** on which this campaign is based. Enter the **name**, **description**, **budget**, and **expected revenue**. And click **Next**.

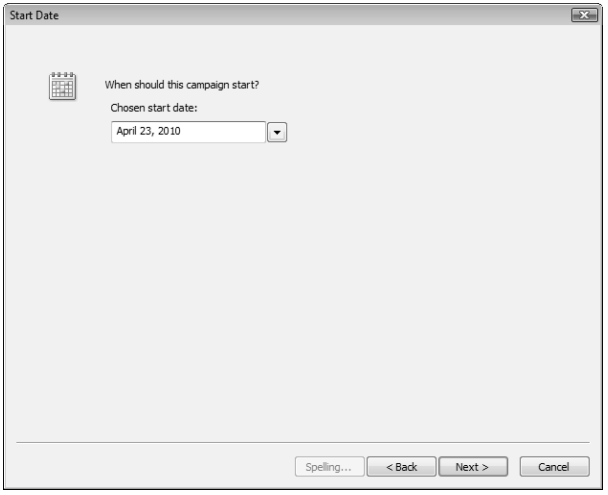


4 Select the **subscribers** to add to the campaign. Click **Next**.

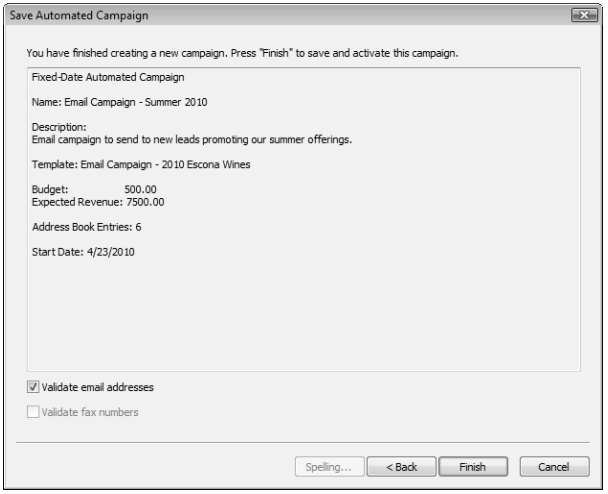
You can choose how to use the current list of Address Book entries. You can select a Favorite List. Or you can choose to search for Address Book entries directly.


Automated Campaign Address Book Entry Selection
Choose one of the following Address Book entry selection options for your Automated Campaign.
All entries in the current Address Book list (331)
Applies the Automated Campaign to the current list in your Address Book window.
Selected entries in the Address Book list (331)
Applies the Automated Campaign to only the selected entries in your Address Book window.
Current entry in the Address Book list (1)
Applies the Automated Campaign to the current entry in your Address Book window.
Favorite List:
All entries in Escona
Applies the Automated Campaign to one of your favorite Address Book entry lists.
Search for entries in the Address Book
Allows you to search your Address Book and then choose entries for the Automated Campaign.
Spelling...
< Back
Next >
Cancel

5 Select the **date** to begin the campaign, and click **Next**.



6 Select the **Validate email addresses** option to be notified of any blank email addresses or those missing the @ symbol, or choose **Validate fax numbers** to be notified of invalid fax numbers. Click **Next**.


Save Automated Campaign
You have finished creating a new campaign. Press "Finish" to save and activate this campaign.
Fixed-Date Automated Campaign
Name: Email Campaign - Summer 2010
Description:
Email campaign to send to new leads promoting our summer offerings.
Template: Email Campaign - 2010 Escona Wines
Budget: 500.00
Expected Revenue: 7500.00
Address Book Entries: 6
Start Date: 4/23/2010
Validate email addresses
Validate fax numbers
Spelling...
< Back
Finish
Cancel

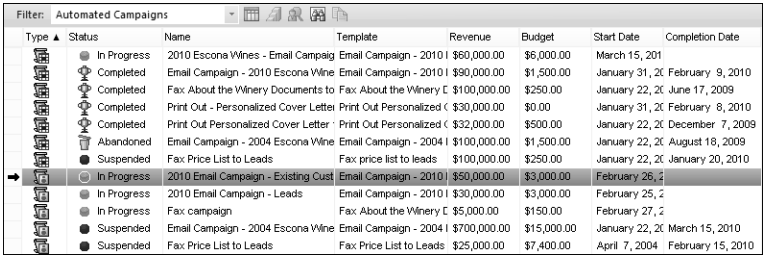
7 Click **Finish** to save and launch the campaign.

Viewing Automated Campaigns

You can view and modify the details of existing automated campaigns.

➤ To view an automated campaign

1. In the Campaigns window, double-click on the automated campaign.


Filter: Automated Campaigns
Type ▲ Status Name Template Revenue Budget Start Date Completion Date
In Progress 2010 Escona Wines - Email Campaig Email Campaign - 2010 I $60,000.00 $6,000.00 March 15, 201
Completed Email Campaign - 2010 Escona Wine Email Campaign - 2010 I $90,000.00 $1,500.00 January 31, 2(February 9, 2010
Completed Fax About the Winery Documents to Fax About the Winery D $100,000.00 $250.00 January 22, 2(June 17, 2009
Completed Print Out - Personalized Cover Letter Print Out Personalized C $30,000.00 $0.00 January 31, 2(February 8, 2010
Completed Print Out Personalized Cover Letter Print Out Personalized C $32,000.00 $500.00 January 22, 2(December 7, 2009
Abandoned Email Campaign - 2004 Escona Wine Email Campaign - 2004 I $100,000.00 $1,500.00 January 22, 2(August 18, 2009
Suspended Fax Price List to Leads Fax price list to leads $100,000.00 $250.00 January 22, 2(January 20, 2010
In Progress 2010 Email Campaign - Existing Cust Email Campaign - 2010 I $50,000.00 $3,000.00 February 26, 2
In Progress 2010 Email Campaign - Leads Email Campaign - 2010 I $30,000.00 $3,000.00 February 25, 2
In Progress Fax campaign Fax About the Winery D $5,000.00 $150.00 February 27, 2
Suspended Email Campaign - 2004 Escona Wine Email Campaign - 2004 I $700,000.00 $15,000.00 January 22, 2(March 15, 2010
Suspended Fax Price List to Leads Fax Price List to Leads $25,000.00 $7,400.00 April 7, 2004 February 15, 2010

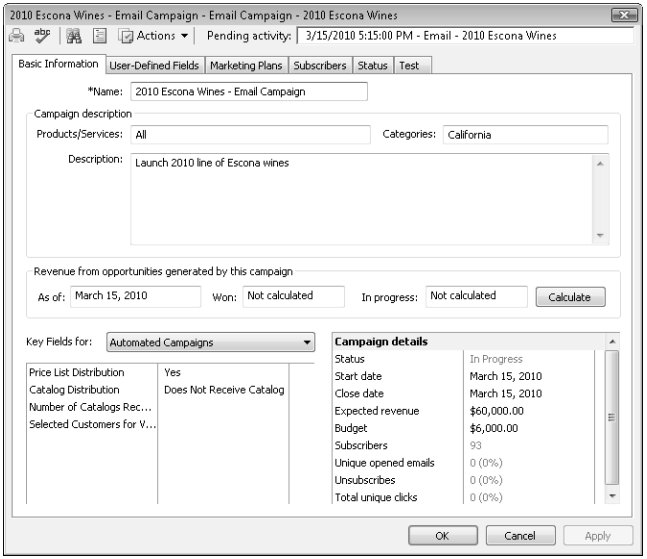
   The Campaign Entry dialog box opens at the Basic Information tab.

2. In the **Basic Information** tab, modify the campaign's basic information.
   - Select **products/services** and **categories** related to the campaign.
   - In the **Key fields** area, select values for important user-defined fields.
   - In the **Campaigns details** area, view statistics on the campaign activities.

     Unique opened emails measures the number of subscribers that open one of the email messages in a campaign. A subscriber in a campaign can increment this count only once in a campaign.

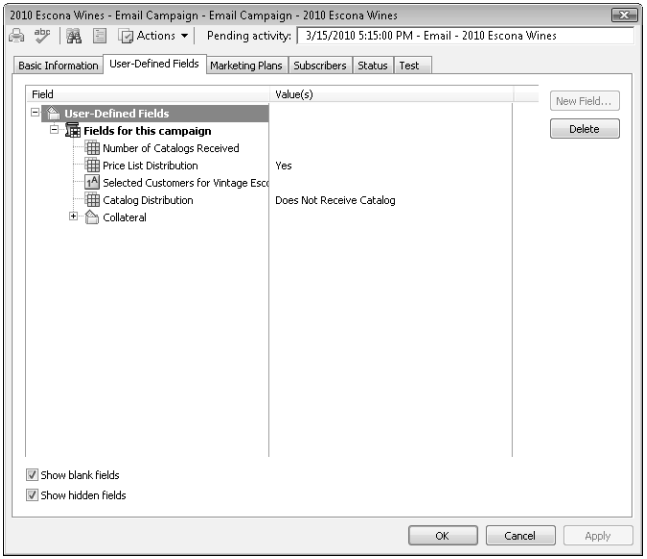
     Unsubscribes measures the total number of subscribers who have unsubscribed from the campaign in all activities.

     Total unique clicks measures the number of unique visits to landing page URLs in the campaign by subscribers. A subscriber in a campaign can increment this count only once per landing page URL, even if the subscriber visits the landing page URL multiple times from different campaign activities.



3 Select the **User-Defined Fields** tab to view and modify the campaign user-defined fields.

These user-defined fields are specific to campaigns and are defined as user-defined fields for campaigns (the type is specified in the Set Up User-Defined Fields dialog box). You can add new campaign user-defined fields by clicking New Field.



4 Select the remaining tabs to view more details on the campaign, and click **OK** to save changes made to the campaign.

Activities in Automated Campaigns

All automated campaigns contain activities that are scheduled to occur during the campaign. Activities are email messages, faxes, or printed documents that are sent as part of automated campaigns. Activities are scheduled to occur a specified number of days after a campaign starts at a specific time. You can also associated personal activities such as Hotlist tasks and appointments with your automated campaigns.

The following sections contain additional information on automated campaign activities:

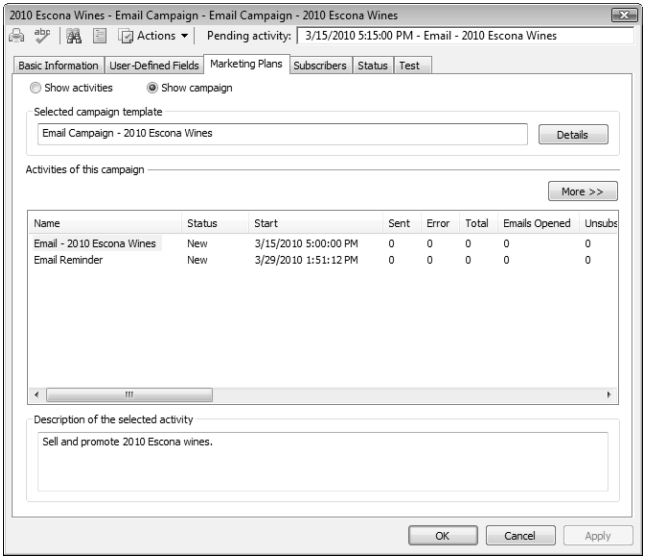
- "Viewing Statistics on Campaign Activities" on page 235
- "Suspending Automated Campaign Activities" on page 236
- "Reviewing Automated Campaign Activities" on page 237

Viewing Statistics on Campaign Activities

You can view statistics on all of the activities in your campaign from the Activities tab in an open campaign. The information you can view includes the number of messages that were sent and that had errors. For email messages, you can also view the numbers of subscribers who opened the email, who unsubscribed from the campaign, and who visited each of the URLs included in the email message.

➤ To view statistics on campaign activities

1. Open the campaign, and select the **Marketing Plans** tab.
2. Select **Show campaign**.
3. Scroll to the right to view more statistics for the activities.



The **Email Opened** and **URL Visited** statistics display the total number of times all subscribers open the email or visit the URL.

The **Unsubscribed** statistic displays the number of subscribers who have unsubscribed from the campaign in this activity.

The **Email Opened Unique** and the **URL Visited Unique** statistics display the number of subscribers who have opened an email or visited the URL.

The **Total URL Visited** statistics add up the statistics for all URLs in the activity.

Suspending Automated Campaign Activities

You can suspend and resume individual activities in your campaign at any time.

➤ To suspend an automated campaign activity

1. Open the automated campaign, and select the **Marketing Plans** tab.
2. Click the **Show campaign** option.
3. Select the activity you want to suspend, click **More**, and select **Suspend**.

   To resume an activity once it has been suspended, select the activity, click **More**, and select **Resume**.

Reviewing Automated Campaign Activities

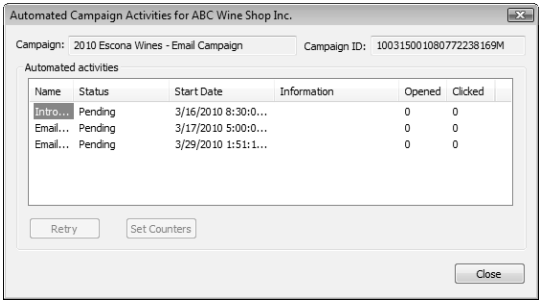
You can review the status of automated campaign activities for each subscriber and retry activities that have failed.

➤ To review campaign activities for a subscriber

1. In the Address Book window, select the Address Book entry for which you want to review activities.
2. Open the **Automated Campaigns** following window.
3. Select a campaign, right-click, and select **Open Automated Activities List**.
4. If a campaign activity has failed, select the activity, and click **Retry** to perform the activity again.
5. To reset the counters for print and fax campaign activities, click **Set Counters**.

   These counters are set up through merge fields available for email campaigns.

The Set Counters button is available for only print and fax campaign activities. You use the Opened and Clicked columns for tracking fax and print collateral customer responses. Email activities cannot be reset as the count is updated dynamically.


Automated Campaign Activities for ABC Wine Shop Inc.
Campaign: 2010 Escona Wines - Email Campaign
Campaign ID: 10031500108077223816 9M
Automated activities
Name Status Start Date Information Opened Clicked
Intro... Pending 3/16/2010 8:30:0... 0 0
Email... Pending 3/17/2010 5:00:0... 0 0
Email... Pending 3/29/2010 1:51:1... 0 0
Retry
Set Counters
Close

Automated Campaign Subscribers

Each automated campaign targets one or more Address Book entries. You can subscribe and unsubscribe Address Book entries to existing campaigns. You can also retrieve a list of Address Book entries that are subscribed to a campaign.

The following sections contain additional information on automated campaign subscribers:

- "Viewing Subscribers for Automated Campaigns" on page 238
- "Adding Subscribers to Automated Campaigns" on page 239
- "Removing Subscribers from Automated Campaigns" on page 240

Viewing Subscribers for Automated Campaigns

Each automated campaign targets one or more Address Book entries. You can quickly retrieve a list of the Address Book entries subscribed to a campaign and display it in the Address Book window.

You can also view lists of Address Book entries who have opened an email message for an automated campaign, clicked on a campaign landing page URL, and unsubscribed from an automated campaign. Yet another option is to view a list of Address Book entries for a selected campaign activity.

You can access these commands from the Campaigns window or the Automated Campaigns following window.

➤ To retrieve a list of subscribers for a campaign

- Select the automated campaign, right-click, and select **Retrieve Address Book Entries**.

  The Address Book window opens and displays the list of the Address Book entries subscribed to the campaign.

  You can also retrieve the Address Book entries for which the campaign was not successful by selecting **Retrieve Unsuccessful Address Book Entries**.

➤ To retrieve a list of subscribers who have opened email or clicked URLs

- Select the automated campaign, right-click, and select an item from the shortcut menu as follows:
  - To retrieve Address Book entries who have opened email messages, select **Retrieve Opened Emails Address Book Entries**.

- To retrieve Address Book entries who have clicked on a landing page URL, select **Retrieve Clicked-Through Address Book Entries**.

Depending on the option you select, the Address Book window opens and displays a list of entries who have opened email or clicked on a landing page URL.

➤ To retrieve a list of entries who have unsubscribed from a campaign

- Select the automated campaign, right-click, and select **Retrieve Unsubscribed Address Book Entries**.

  The Address Book window opens and displays the list of entries who have unsubscribed from the automated campaign.

➤ To retrieve a list of subscribers for a campaign activity

1. Select the automated campaign, right-click, and select **Retrieve Address Book Entries by Activity**.
2. Select the activity, and select the subscribers you want to retrieve.

   Options for specifying which entries are retrieved include: **All subscribers**, **Unsuccessful entries**, **Opened email entries**, **Unsubscribed entries**, and **Clicked-through entries**.

   If you select **Clicked-through entries**, you can also specify which landing page URLs are visited.
3. Click **OK**.

Adding Subscribers to Automated Campaigns

You can add any Address Book entries as subscribers at any time to existing automated campaigns. You can search for an Address Book entry to add it individually, or you can add all Address Book entries from the current list.

If you add a subscriber to a fixed-date campaign, all activities that are already completed in the campaign are sent at once to the Address Book entry. If you add a subscriber to an ongoing campaign, the campaign is run from the beginning and all activities are completed at their scheduled intervals.

➤ To add a subscriber to an automated campaign

1. Open the campaign, and select the **Subscribers** tab.
2. Click **Add** and select **Search for Address Book Entries** or **Add from Address Book List**.
3. Search for an Address Book entry by **last name** or **Company name**, select the entry, and click **OK**.

   – or –

   Click **OK** to confirm that you want to add all Address Book entries in the current list.

➤ To add a subscriber from the Address Book window to an automated campaign

1. In the Address Book window, select the Address Book entry that you want to add to the campaign.
2. On the **Home** tab, select **Assign to Automated Campaign** from the **Subscribe** group.

   The Subscribe Address Book Entry to Automated Campaign dialog box opens displaying all automated campaigns in progress.
3. Select the campaign to which you want to subscribe the entry, and click **Subscribe**.

   You can continue selecting campaigns to subscribe the entry to multiple campaigns.
4. Click **Close** to close the dialog box.

Removing Subscribers from Automated Campaigns

You can remove Address Book entries that are already subscribed to a campaign. You can remove the current Address Book entry in the Address Book window, you can select entries to remove from the campaign directly in the Subscribers tab, or you can remove all entries in the current list of Address Book entries.

ⓘ You can flag Address Book entries to not be included in specific types of campaign activities by using the "Do not solicit by" field on the Basic Information tab.

➤ To remove a subscriber in the Address Book window from a campaign

1. In the Address Book window, select the Address Book entry that you want to remove from the campaign.
2. Select the **Automated Campaigns** following window.
3. Right-click on the automated campaign, and select **Unsubscribe from Selected Campaign**.

➤ To remove subscribers from a campaign

1. Open the campaign, and select the **Subscribers** tab.
2. Select the subscribers that you want to remove.
3. Click **Remove**, and select **Remove Selected Entries**.

➤ To remove subscribers in the current list from a campaign

1. Open the campaign, and select the **Subscribers** tab.
2. Click **Remove**, and select **Remove Based on Address Book List**.

Status of Automated Campaigns

You can view the current status of your automated campaigns in the Status column in the Campaigns window. You can also change the status and view more details on the status of campaigns in the Status tab of an open campaign.

The following sections contain additional information on the status of automated campaigns:

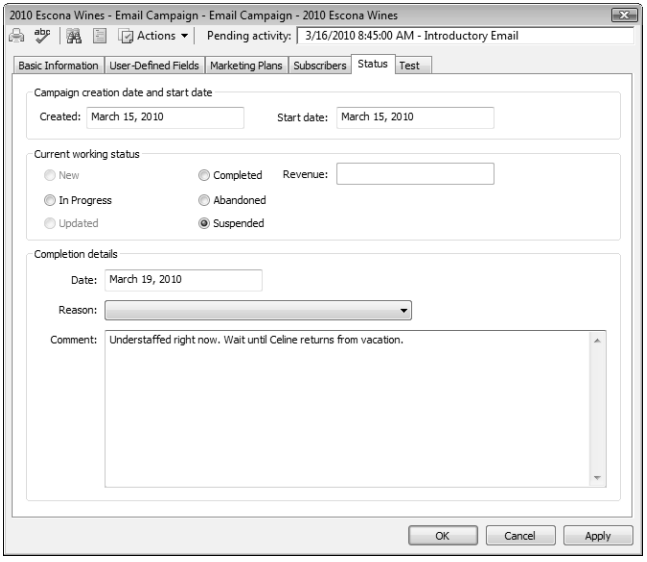
- "Suspending Automated Campaigns" on page 242
- "Resuming Automated Campaigns" on page 243

Suspending Automated Campaigns

You can suspend automated campaigns that are in progress at any time. When a campaign is suspended, all of the activities in the campaign are also suspended.

➤ To suspend an automated campaign

1. Open the campaign, and select the **Status** tab.
2. In the **Current working status** area, select **Suspended**.
3. Optionally, in the **Completion details** area, specify the **date** and **reason**, and enter a **comment**.



4. Click **OK**.

Resuming Automated Campaigns

You can resume any existing automated campaigns that are completed, abandoned, or suspended at any time. Any incomplete activities in the campaign also resume.

➤ To resume a campaign

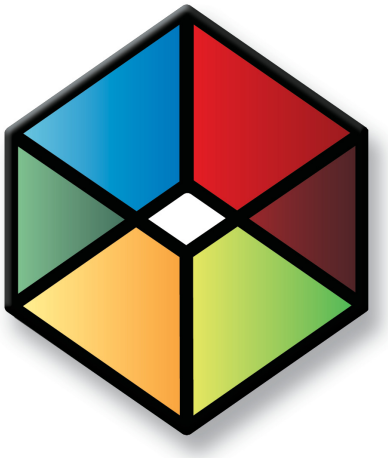
1. Open the campaign, and select the **Status** tab.
2. In the **Current working status** area, select **In progress**.
3. Click **OK**.

Testing Automated Campaigns

You can add subscribers that test all of the activities in the automated campaign at once. When you run the test, all of the activities in the campaign are sent to the subscribers ignoring the date and start time of the activity.

➤ To test an automated campaign

1. Open the campaign, and select the **Test** tab.
2. If necessary, add Address Book entries to the test:
   - Click **Add** and select **Search for Address Book Entries** or **Add from Address Book List**.
   - Search for an Address Book entry by **last name** or **Company name**.
3. Click **Run Test**.



CHAPTER 10

Customer Service

Provide the Key to Success with Customer Service

In this chapter...

"Customer Service Cases" on page 246
"Adding Customer Service Cases" on page 249
"Status of Customer Service Cases" on page 252
"Email Notification for Customer Service Cases" on page 257
"Knowledge Base" on page 261
"Adding Articles to the Knowledge Base" on page 265

Customer Service Cases

The customer service features in Maximizer help support and enhance your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

The following sections contain overview information on working with customer service cases:

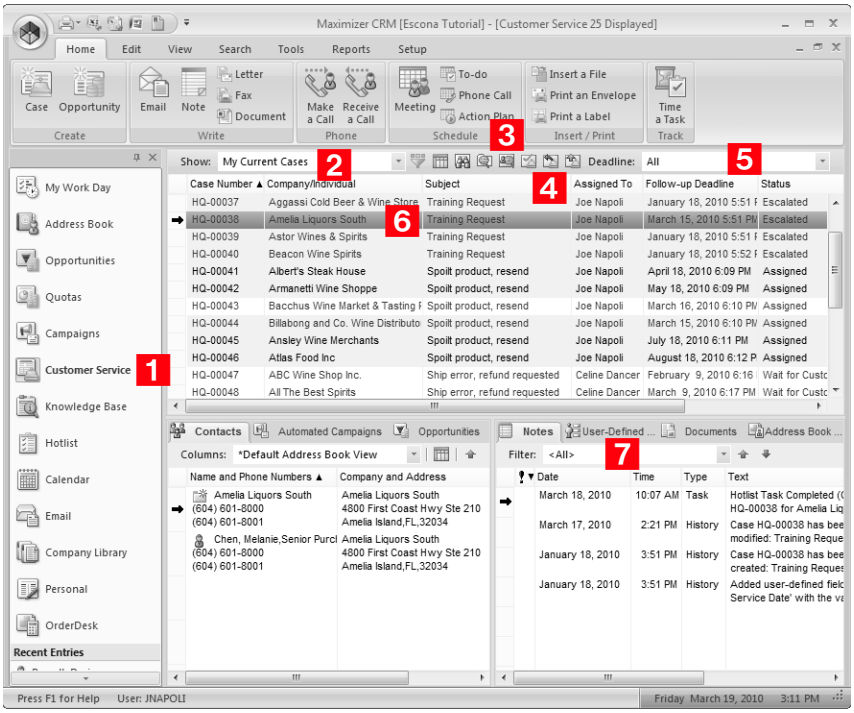
- "Customer Service Window" on page 246
- "Viewing Customer Service Cases" on page 247

Customer Service Window

The Customer Service window is list-based like the other Maximizer windows. Keep the following points in mind while working with the Customer Service window:

1. Select the **Customer Service** icon to open the Customer Service window.
2. Use the **Show** drop-down list to display cases assigned to you or show other queues. You can also use the Status Filter button to filter cases by status (the filter is also available through View > Status Filter).
3. Use the **View in Address Book** button to view the Address Book entries associated with a single case or multiple cases.
4. Use the **View bar** buttons to resolve, assign, and escalate cases.
5. Use the **Deadline** drop-down list to view cases according to deadline.
6. Double-click on a **customer service case** to view or modify it.
7. Use the **following windows** to view additional information for the selected customer service case.

When the Address Book window is active, you can select the Customer Service following window to display the customer service cases associated with the selected Address Book entry.



Viewing Customer Service Cases

You can view and modify existing customer service cases in your Address Book from the Customer Service window or from the Address Book entry associated with the customer service case.

➤ To view a case from the Customer Service window

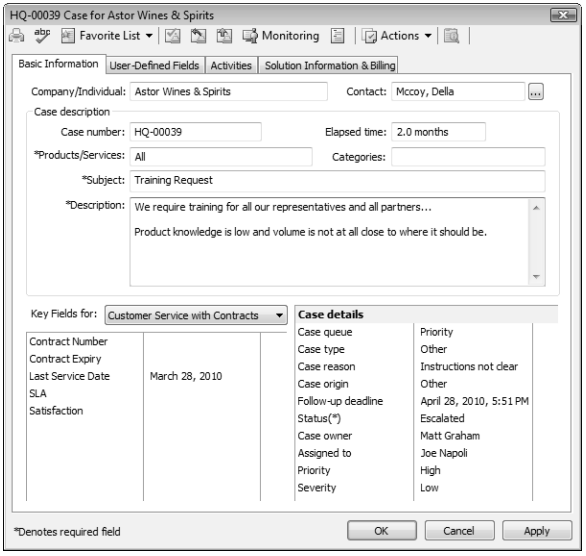
1. Select the **Customer Service** icon to open the Customer Service window.

   The Customer Service window opens.

2. If necessary, select an option from the **Show** drop-down list.

3. Double-click on an entry to open it.

   The Case dialog box opens displaying the details of the case.



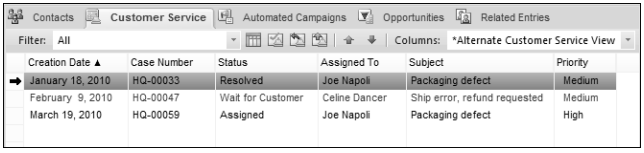
4 Select the other tabs to view more information on the case.

➤ To view a case from an Address Book entry

1 Select the Address Book entry.

2 Select the **Customer Service** following window.

All customer service cases for the current Address Book entry are displayed in the list.



3 Click on a customer service case to open it.

Adding Customer Service Cases

You can create customer service cases to track and resolve customer service issues. Customer service cases are always associated with Address Book entries. When creating a new case, you can select an Address Book entry or select an existing customer service case or opportunity associated with the Address Book entry.

➤ To add a customer service case

1. Select the Address Book entry or an opportunity or case associated with the entry.
2. On the **Home** tab, select **Case** from the **Create** group.

   – or –

   Drag the entry to the **Customer Service** following window.

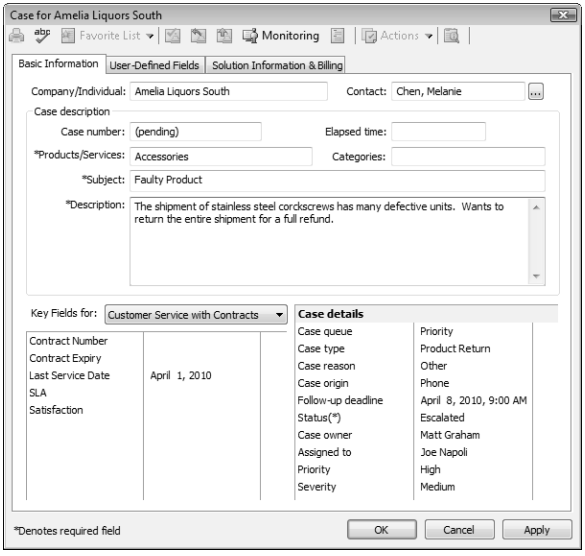
   – or –

   Right-click and select **Create a Customer Service Case**.
3. If necessary, click the ellipsis button next to the **Contact** field to search for a Contact for the case.

   The Contact can be associated with any Company or Individual in the Address Book, and not only with the selected Address Book entry.
4. Specify the basic fields for the customer service case.
   - Select the applicable **Products/Services** and **Categories** for the case.
   - Enter a **Subject** and a **Description** of the case.
5. Select a **Key Fields** list and select the appropriate key fields for the customer service case.

   Key Fields are important user-defined fields specific to customer service cases and are defined in the Key Fields preferences in Administrator. (Select File > Preferences, and select the Key Fields tab.) An unlimited number of Key Fields lists can be set up using up to eight customer service user-defined fields for each list.
6. Specify the remaining **case details**.
   - In the **Follow-up by** field, select the follow-up deadline for the case.
   - In the **Case Owner** field, select the Maximizer user who is ultimately responsible for the closure of the case.
   - In the **Assigned to** field, select the Maximizer user who the case is assigned to.

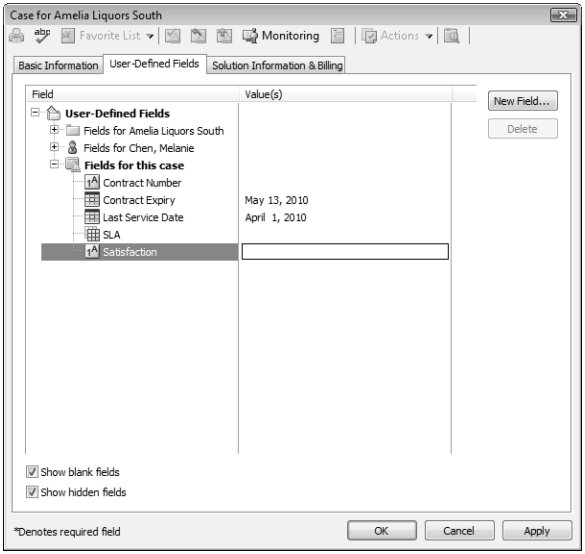
A Hotlist task, based on the follow-up deadline, is automatically created for the assigned user. The task is automatically modified when the follow-up deadline or assigned user is modified. And when the case is resolved, the task is marked as complete.



7 Select the **User-Defined Fields** tab to specify additional values for case fields.

The User-Defined Fields tab contains Address Book user-defined fields in the Fields for [Address Book entry] folder and Customer Service user-defined fields in the Fields for this case folder.

If you cannot see one of the user-defined fields you need, select the **Show blank fields** checkbox to display all fields.



8 Click **OK** to save the new customer service case.

Adding Customer Service Cases from Email

You can create customer service cases related to existing or new Address Book entries right from the Email window.

Note that the Customer Service window must be open before you can create a case from the Email window.

➤ To add a customer service case from an email message

1 In the Email window, select the email message.

2 On the **Home** tab, select **Case** from the **Create** group and select the Address Book entry to create the case for.

– or –

Right-click and select **Create a New > Case for [Address Book entry]**.

You can create a case for either the currently selected Address Book entry or for the Address Book entry matching the email address of the email message.

3 Enter the case details.

By default, the email subject becomes the case subject, and the email body becomes the case description.

4 Click **OK** to save the customer service case.

Status of Customer Service Cases

You can change the status of a customer service case at any time. When you assign a case to another representative or escalate a case to a manager, you can specify a new status for the case. The status also changes when you resolve a cases.

You can also set up custom statuses for cases and select which statuses are available when you assign, escalate, and resolve cases in the customer service preferences in Administrator. (Select File > Preferences, and select the Customer Service tab.)

The following sections contain additional information about the status of customer service cases:

- "Assigning and Escalating Customer Service Cases" on page 252
- "Case Hotlist Tasks" on page 254
- "Resolving Customer Service Cases" on page 254
- "Recording Case Solutions" on page 256

Assigning and Escalating Customer Service Cases

Customer service cases should be assigned to the customer service team member who is best able to handle the type of issue. A customer service team member is categorized in Administrator as a customer service representative or a customer service manager, though a manager can serve both roles. Cases are assigned to representatives and escalated to managers when representatives are unable to resolve the cases.

Cases can be assigned and escalated as often as required. When a case is assigned or escalated, you can type a message to record why the case is assigned or escalated. This message is then included in the logged note.

You can send email to the user who is now responsible for the case when you assign or escalate a case. The email message is system-generated and cannot be edited in Maximizer or Administrator.

The customer also can be notified by email when a case is assigned or escalated so the customer always knows who is handling the case although the owner of the case is the person who is ultimately responsible for the closure of a case. If a Contact is associated with

the case, the email message is sent to the Contact. Otherwise, the message is sent to the Company/Individual.

➤ To assign or escalate a customer service case

1. Select or open the customer service case.
2. Select the **Assign** or **Escalate** icon.

   – or –

   On the **Edit** tab, select **Assign Case** or **Escalate Case** from the **Process** group.

   The Assign Case or the Escalate Case dialog box opens.
3. In the **Assign to** or **Escalate to** drop-down list, select a Maximizer user.

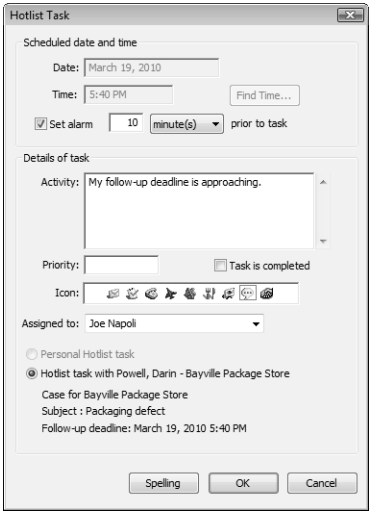
   To be listed in this dialog box and to access the Customer Service window, users must be assigned to the Customer Service Manager or the Customer Service Representative role in Administrator.
4. In the **Status** drop-down list, select the status of the case, or leave the default status.

   The default status is Assigned or Escalated. But you can select any status that is set up to display in Administrator.
5. Enter a **Note** about the case assignment or escalation.
6. In the **Actions** area, select the corresponding option to notify the assigned user and/or case owner.
7. Click **OK** to finish assigning or escalating the case.

Case Hotlist Tasks

Hotlist tasks are automatically created when users and follow-up deadlines are assigned to cases. When a case is assigned or escalated, a Hotlist task is created for the user to which the case has been assigned or escalated. The original user's task remains. If a case is assigned or escalated to yet another user, a task is created for that newly-assigned user and so on for each assigned user. When a case is resolved, the original task is automatically marked as complete.

The task date and time correspond with the case follow-up deadline. The assigned user, the associated Address Book entry, and the case subject are included as the task details. Case tasks are created regardless of Hotlist access rights.



Resolving Customer Service Cases

When you solve a customer's issue, you can resolve the customer service case in Maximizer. You can document the details of how the case is resolved, add a new solution (if any) to the knowledge base, and notify the customer and user to whom the case is assigned. You can perform these tasks right in the Resolve Case dialog box.

➤ To resolve a customer service case

1. Select or open the customer service case.
2. Select the **Resolve** icon.

   – or –

   On the **Edit** tab, select **Resolve Case** from the **Process** group.

3 Specify the billing information for the case.

- Select a **Billing type**.
- Specify the number of hours worked on the case in the **Billable time (hrs)** field.
- Enter the hourly rate in the **Billing rate** field.
- If Maximizer prompts you to update the Case fee automatically by multiplying the Billing rate by the Billable time, click either **Yes** or **No** to specify your preference. Otherwise, enter the **Case fee**.

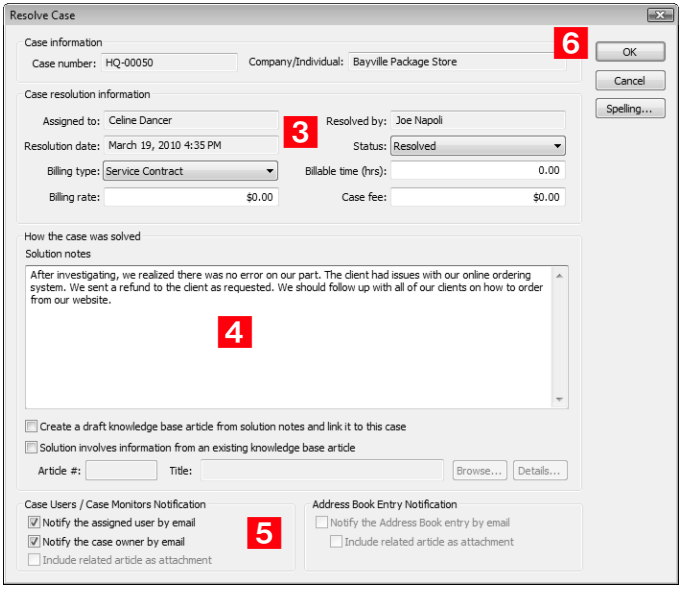
4 Enter the **Solution notes** for the case. These notes would include any specific information about how the case was resolved.

You can also select a knowledge base article to link to the case, or create a draft knowledge base article from the solution note.

Note that you can include this information in automated email templates for customers by using the Case_Solution_Note merge field.

5 If desired, select one or more of the options in the notification areas to send email to other Maximizer users who worked on the case or to the Address Book entry associated with the case.

6 Click **OK** to finish resolving the customer service case.


Resolve Case
Case information
Case number: HQ-00050
Company/Individual: Bayville Package Store
6
OK
Cancel
Spelling...
Case resolution information
Assigned to: Celine Dancer
Resolved by: Joe Napoli
3
Resolution date: March 19, 2010 4:35 PM
Status: Resolved
Billing type: Service Contract
Billable time (hrs): 0.00
Billing rate: $0.00
Case fee: $0.00
How the case was solved
Solution notes
After investigating, we realized there was no error on our part. The client had issues with our online ordering system. We sent a refund to the client as requested. We should follow up with all of our clients on how to order from our website.
4
Create a draft knowledge base article from solution notes and link it to this case
Solution involves information from an existing knowledge base article
Article #:
Title:
Browse...
Details...
Case Users / Case Monitors Notification
Notify the assigned user by email
Notify the case owner by email
Include related article as attachment
5
Address Book Entry Notification
Notify the Address Book entry by email
Include related article as attachment

Recording Case Solutions

While resolving a customer service case, you can keep track of the solution to the case in the knowledge base. You can choose from the following options:

- **Solution involves information from an existing knowledge base article –** Select this option if an existing knowledge base article resolved the case. Enter the knowledge base article number.
- **Create a draft knowledge base article from solution notes and link it to this case –** Select this option if the case was resolved without the assistance of an existing knowledge base article. Type a concise, detailed explanation of how the case was resolved in the Solution notes text box. If the status is set to Abandoned, this option is unavailable.

Email Notification for Customer Service Cases

When customer service cases are created, assigned, escalated, or resolved, email messages can be automatically sent to customers and users notifying them of the changes. Maximizer automatically inserts the basic details of the case in the message so you don't have to write the email message with opportunity details each time.

To set up case email notification, you must create email notification templates in Administrator. You can create separate templates for each action (create, assign, escalate, or resolved). Each action can also have separate templates for sending email to customers/partners and users. Partners can receive the same email notification as their associated customer. User notification email is sent to the users identified as monitors for the case.

For detailed information on how to create email templates for case notification, see the *Maximizer CRM Administrator's Guide*.

The following sections contain additional information on email notification for customer service cases:

- "Selecting Users for Case Monitoring" on page 257
- "Customer Service Merge Fields" on page 259

Selecting Users for Case Monitoring

A default list of case monitors is set up in the Customer Service preferences in Administrator. You can select this default list, or you can select any other users to monitor specific customer service cases. You can also choose not to monitor specific customer service cases.

All users with modify permissions for cases can add or remove case monitors. Case monitoring access rights are not separate from general customer service rights. If a particular user should not be modifying case monitors, all case modification rights can be removed in Administrator.

Case monitors receive email messages based on templates set up in Administrator. You can create different templates for each type of action. See the *Maximizer CRM Administrator's Guide* for details.

You can also specify how to monitor new cases in the default case entry.

➤ To select a user for case monitoring

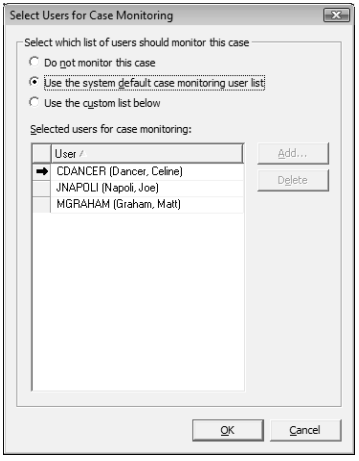
1. Select or open the customer service case.
2. On the **Edit** tab, select **Monitor Case** from the **Process** group.

   – or –

   Right-click and select **Case Monitoring**.

   – or –

   Select the **Monitoring** icon in an open customer service case.
3. Select one of the case monitoring options.
   - Select **Do not monitor this case** to remove all users from the list so no user receives email regarding this case.
   - Select **Use the system default case monitoring user list** to display the users specified in the system default case monitoring list.
   - Select **Use the custom list below** to modify the list of users who monitor the case.



4. If you select to use a custom list for case monitoring, click **Add** to add a user to the list.

   The Users dialog box opens displaying the users that are available to add to the list.
5. Select a user and click **OK** to add the user to the list.

6 Click **OK** to save the changes to the case monitoring list.

Customer Service Merge Fields

Merge fields in the email template personalize the message for each recipient by replacing the merge field code with the actual field value for that Address Book entry. For example, including the {First_Name?} merge field in an email template would replace that code with each email recipient's actual first name.

You can create templates in either .ETF (Maximizer Word Processor) or .HTML format. When creating templates in the Maximizer Word Processor, simply click the Merge Field button and select the merge field to insert into your email template. However, HTML templates are created in an HTML or text editor, which does not contain the Maximizer merge field selection dialog box. While you can manually type the merge field codes into your HTML document, it's easier to first create the template in the Maximizer Word Processor and then copy the template (including the merge field codes) into an HTML template.

For a complete list of available merge fields to include in the email templates, see the Insert Merge Field dialog box in the Maximizer Word Processor. Press F1 when a field is selected to view its description. Commonly used customer service merge fields are described below:

The question mark in a merge field is used to alert users to not leave a space if no value is assigned to the related Address Book entry for the merge field.

- **{My_Name?} –** Full name of the logged-in user (first name, initial, and last name).
- **{My_Company?} –** Name of the logged-in user's company.
- **{CS.Case_Number?} –** Case number.
- **{CS.Client_Name?} –** Name of the associated Address Book entry (Company or Individual).
- **{CS.Contact_Name?} –** Name of the Contact associated with the case. Because this field is not mandatory in customer service cases, a value may not display in case notification emails.
- **{CS.Subject?} –** Case subject.

- **{CS.Assigned_To?} –** Name of the user who the case is assigned to. Applies to case assignment or escalation emails only.
- **{CS.Resolved_By?} –** Name of the user who resolved the case. Applies to case resolution emails only.
- **{CS.Resolved_Date?} –** Date when the case was resolved. Applies to case resolution emails only.
- **{CS.Resolved_Time?} –** Time when the case was resolved. Applies to case resolution emails only.
- **{Case_Solution?} –** Knowledge base article number associated with the case resolution. Applies to case resolution emails only.
- **{Case_Solution_Note?} –** Notes from the Solution Notes field in the Solution Information & Billing tab of the Case dialog box. Applies to case resolution emails only.

Knowledge Base

The knowledge base keeps track of the solutions to your customer service cases. Each separate case solution is stored in a knowledge base article. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

Articles in the knowledge base are stored in a standard (text) format or in a document (file attachment) format.

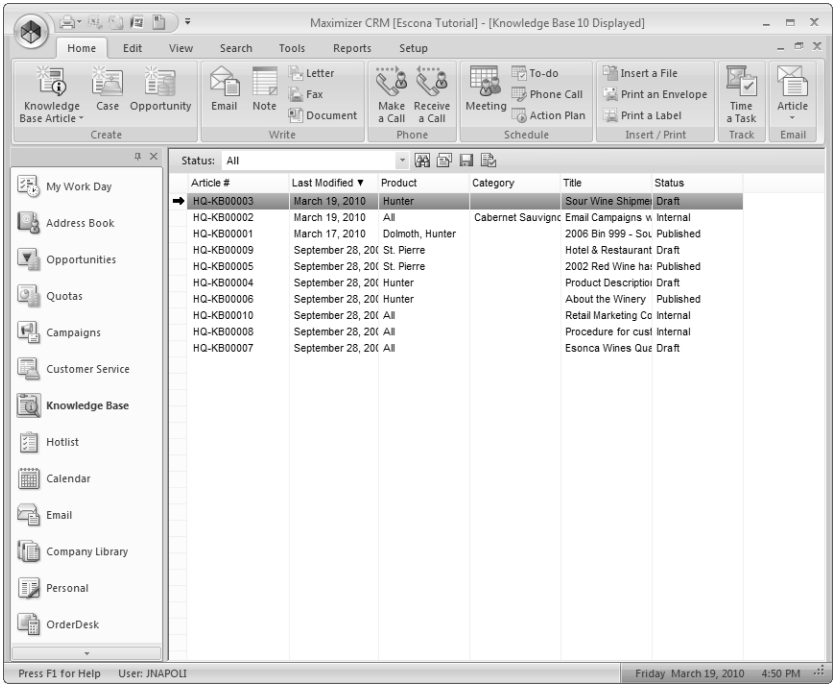
The following sections contain information about the knowledge base:

- "Knowledge Base Window" on page 261
- "Viewing Knowledge Base Articles" on page 262
- "Searching for Knowledge Base Articles" on page 263
- "Status of Knowledge Base Articles" on page 264

Knowledge Base Window

The Knowledge Base window provides you with a library-style tool to manage your knowledge base articles. The window is tightly integrated with the Customer Service window.

The Knowledge Base window displays articles according to number, last modified date, product, category, title, and status. Click on a column heading to sort the articles by the column subject matter. To pop up a convenient list of commands to manage articles, click your right mouse button.



Viewing Knowledge Base Articles

The knowledge base ensures that valuable case solutions are recorded, reviewed for quality assurance, and made available to the appropriate users. You can view and modify existing knowledge base articles as long as you have the required permissions.

➤ To view a knowledge base article

1. Select the **Knowledge Base** icon.

   The Knowledge Base window opens.

2. If necessary, select an option from the **Status** drop-down list to filter the list of articles.

3. Double-click on an article to open it.

   The Knowledge Base Article dialog box opens displaying details on the articles.

   If the article is in standard format, the entire content of the article is displayed.

   If the article is in document format, a preview of the article is displayed.

4. To view the content of a document article, click **Open**.

   To replace the content of the article, click **Browse** and select the new article.

5. If you are modifying the article, click **OK** to save the changes.

Searching for Knowledge Base Articles

You can search the knowledge base for any article that matches the basic article fields you specify, such as creator, owner, and last modification date. To find all articles, leave all the fields blank.

You can also search for articles by phrase. Once selected, the three search options just described apply to the article content, as well as to the title and keywords. The Search by Phrase option searches the article title and keywords and can be fine-tuned using the following options:

- **Article contains all of the words in phrase –** Searches for every word you specify.
- **Article contains the exact phrase –** Searches for the words in the exact order you specify.
- **Article contains at least one of the words in phrase –** Searches for at least one of the words you specify.

You can choose to search the article content, as well as the title and keywords, using the "Include article body contents when executing search" option.

If you are running Maximizer on a SQL server, the Full-Text Search engine must be installed in order to search article content. If this option is grayed out, contact your system administrator or see the *Maximizer CRM Administrator's Guide* for information on how to enable the full-text search in SQL.

Status of Knowledge Base Articles

The status of knowledge base articles determines which users can read or modify articles. Articles can also have the following statuses:

- **Draft –** Articles can be viewed and modified by creators, owners (users or security groups), and approvers.
- **Internal –** Articles can be viewed by all users who have knowledge base read rights, excluding external web access users (customers and partners).
- **Published –** Articles can be viewed by all users who have knowledge base read rights, including external web access users (customers and partners), and modified by approvers.
- **Expired –** Articles can be viewed and modified by creators, owners (users or security groups), and approvers.

Adding Articles to the Knowledge Base

When you resolve customer service cases, you can create new knowledge base articles automatically from case solution notes. Cases are automatically linked to their new knowledge base articles. You can also add knowledge base articles directly to the Knowledge Base window. These articles are not linked to specific customer service cases, though you can link the articles to cases in the future.

You can add articles to the knowledge base in standard (text) format and in document (file attachment) format. If the article content is short and straightforward, standard format should suffice. However, if you want to carefully compose the article over a day or two, confirm data with an external source, or run a spell check, you may wish to write the document in Microsoft Word, for example, and then attach the article as a document.

A newly created article is assigned a draft status until it is opened and assigned a different status by the appropriate users.

The following sections contain information on adding articles to the knowledge base:

- "Adding Standard Knowledge Base Articles" on page 265
- "Adding Document Knowledge Base Articles" on page 266
- "File Formats for Document Knowledge Base Articles" on page 267
- "Saving and Sending Knowledge Base Articles" on page 267

Adding Standard Knowledge Base Articles

Standard format knowledge base articles contain only text. You can specify all details and content of the article directly in the Knowledge Base Article dialog box.

➤ To add a standard knowledge base article

1. In the Knowledge Base window, on the **Home** tab, select **Knowledge Base Article > Standard Format** from the **Create** group.

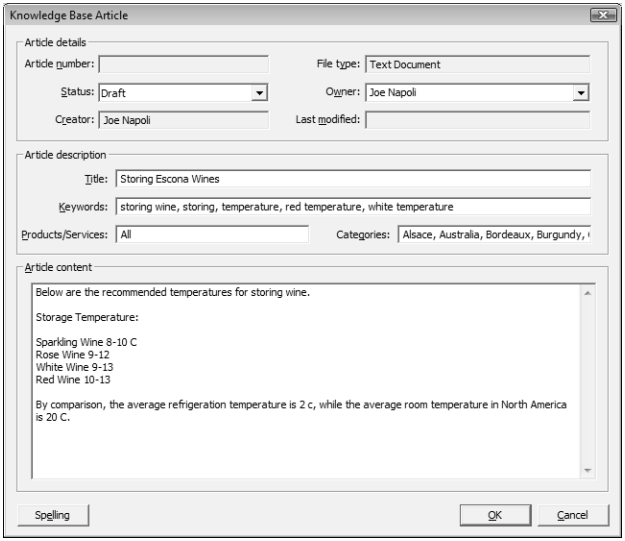
   – or –

   Right-click and select **Add Knowledge Bas Article > Standard Format**.

2. Specify details on the article, including the **Title**, **Keywords**, **Products/Services**, and **Categories**.

3. In the **Article content** area, enter the complete content of the knowledge base article.

4 Click **OK** to save the article to the knowledge base.



Adding Document Knowledge Base Articles

You can add any type of file to the knowledge base as a document article. When attaching the file, you can browse to folders on your computer or network.

➤ To add a document knowledge base article

1 In the Knowledge Base window, on the **Home** tab, select **Knowledge Base Article > Document Format** from the **Create** group.

– or –

Right-click and select **Add Knowledge Bas Article > Document Format**.

2 Browse to and select the file, and click **Open**.

3 Specify details on the article, including the **Title**, **Keywords**, **Products/Services**, and **Categories**.

4 Click **OK** to save the article to the knowledge base.

File Formats for Document Knowledge Base Articles

Files of any format can be attached to the knowledge base as a document article. However, the content of only the following file formats can be searched:

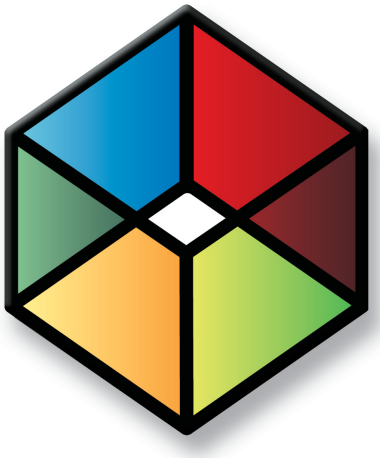
- Microsoft Word (*.DOC)
- Microsoft Excel (*.XLS)
- Microsoft PowerPoint (*.PPT)
- Text (*.TXT)
- HTML (*.HTM or *.HTML)

Saving and Sending Knowledge Base Articles

Any article can be saved or sent by email. However, due to a file naming convention, an article title containing the following characters cannot be saved or sent by email:

? / * : " | \ < >

If you want to save or send the contents of an article that contain these characters in the file name or article title, Maximizer automatically replaces them with underscores so the file can be saved or sent by email.



CHAPTER 11

Maximizer on the Web

Use Maximizer Around the Globe

In this chapter...

"Maximizer on the Web" on page 270
"Maximizer Web Access" on page 271
"Partner Access" on page 275
"Customer Access" on page 279

Maximizer on the Web

For many organizations, it's impractical to send an entire database to each remote machine—the database may be too large; there may be concerns about distributing valuable lead and customer information; or there may be a concern about connection times and the amount of data being sent.

Maximizer's web access sites give remote users access to the central Maximizer database via the web. Remote users can access and work with Address Book entries as they would in Maximizer at the office.

Remote users need only a web browser, Maximizer user ID, and password. A travelling business person could step into a web café or borrow someone's computer to quickly connect to the home office Address Book. Once online, it's easy to work with contact data, check Hotlist tasks and calendar appointments, customer service cases, and opportunities.

The web access sites provide Maximizer database access to people who don't have Maximizer installed. A company could have its distributor list in Maximizer and allow web access to that list so any other member of the channel—with the proper password—could go online and browse the distributor directory.

Maximizer on the Web has four components—Maximizer Web Access, Wireless Access, Partner Access, and Customer Access.

Maximizer Web Access

You can access Maximizer Web Access through the Start menu or by entering its URL in a browser.

You can access the sample Escona Tutorial Address Book using "jnapoli" as the user ID and "maximizer" as the password.

➤ To access Maximizer Web Access

1. To access Maximizer Web Access through its URL, enter the **URL** in any web browser. The URL is set by your system administrator. Typically, the URL would look like the following:

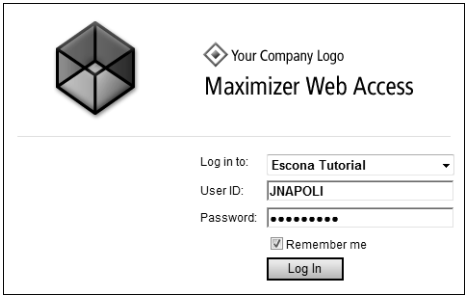
   http://[YourServerName]/MaximizerWebAccess/Default.aspx

   – or –

   To access the site through the Start menu, select **Start > Programs > Maximizer CRM > Web Access > Maximizer Web Access**.

If you are using Microsoft Internet Explorer, you should not run Maximizer Web Access in multiple tabs at the same time.

2. Select the **Address Book** you want to open, and enter your **User ID** and **password**.



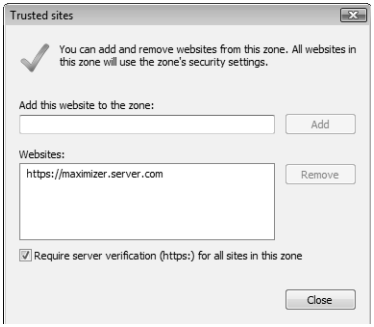
Configuring Browsers for Maximizer Web Access

Maximizer Web Access runs in Microsoft Internet Explorer and Mozilla Firefox. For an up-to-date list of supported browsers, visit the Maximizer website: www.maximizer.com

If you use Internet Explorer, you may need to adjust your security settings to access the full functionality of Maximizer Web Access. In Internet Explorer, you must add the Maximizer Web Access server to the Trusted sites zone with the security level set to Medium-low.

➤ To configure Internet Explorer to use Maximizer Web Access

1. In Internet Explorer, select **Tools > Internet Options**, and select the **Security** tab.
2. Select the **Trusted sites** security zone, and click **Sites**.
3. If necessary, clear the **Require server verification (https:) for all sites in this zone** checkbox.
4. Enter the URL for the Maximizer Web Access server and click **Add**.


Trusted sites
You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.
Add this website to the zone:
Add
Websites:
https://maximizer.server.com
Remove
Require server verification (https:) for all sites in this zone
Close

5. Click **Close**.

   Maximizer Web Access is added to the Trusted sites security zone.
6. With the Trusted sites zone still selected, click **Custom Level**.
7. In the **Reset custom settings** area, select **Medium-low** from the **Reset to** drop-down list.
8. Click **OK** to save the changes in the Security Settings dialog box, and click **OK** again to save your Internet options.

Navigation Tips

Because Maximizer Web Access runs inside your browser, you navigate its pages the same way you navigate a website. Here are some tips for navigating Maximizer Web Access:

- To move back a page, click the **Back** button on your browser's toolbar. Click the **Forward** button on the browser's toolbar to move forward. (On the keyboard, you can move backwards and forwards by pressing Alt + left or right arrow key.)
- If you repeatedly run Maximizer Web Access from the same computer, create a **Favorite** or **Bookmark** to the Login page so you never have to re-enter the URL.

Maximizer Web Access Interface

Like in Maximizer, information in Maximizer is displayed in lists, which means that it can be sorted and arranged in rows and columns. You can easily move from page to page to access different types of entries. For detailed information on using Maximizer Web Access, see the *Maximizer Web Access User's Guide*. (In Maximizer Web Access, select Help > User's Guide.)

Keep the following points in mind when working with the Maximizer Web Access pages.

1. Select or open **entries** in the list to view information and perform tasks on the entries.
2. Use the **menus** to access all tasks that are available in the current page.
3. Select an **icon** in the icon bar to move to a different page.
4. At the top of the icon bar, use the button with the **arrows** on it to hide or display the icon bar view.
5. Use the **view bars** in a page to filter your list and access common tasks and the column setup.
6. Hover your mouse over an entry and click the **Summary** icon to view additional information on the entry in a **pop-up** window.
7. Use the **controls** at the bottom of a list to choose the number of entries displayed on a page and to navigate from page to page.

   Click on a page number to move to a different page. The arrow buttons take you to the next and previous pages, as well as to the first and last page. The ellipsis buttons take you to the next and previous 10 pages.

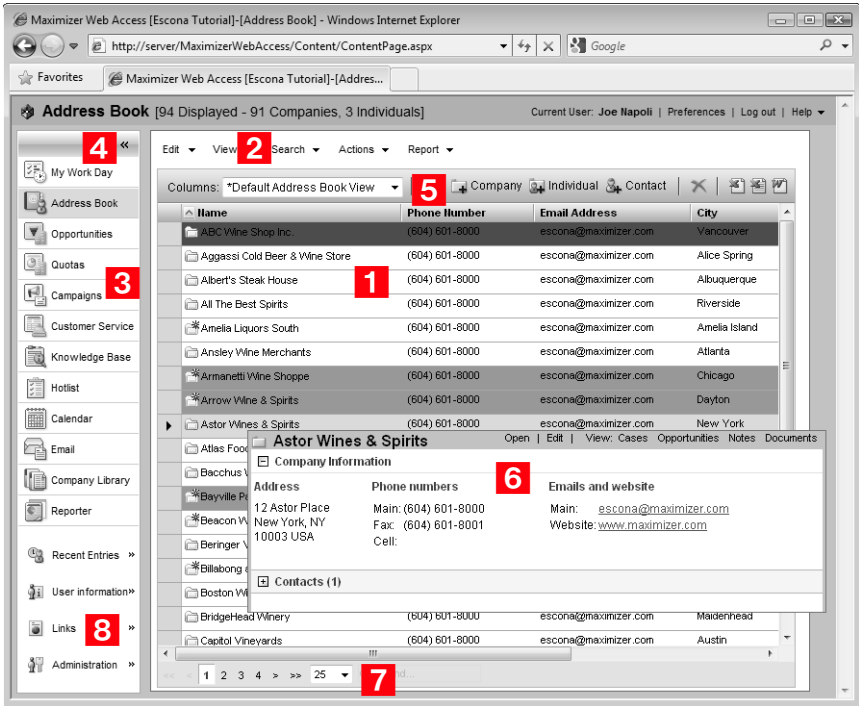
8 Hover your mouse over the links in the left navigation pane to access additional commands in pop-ups including the following:

Recent Entries to select an Address Book entry that you recently accessed.

User Information to view phone lists and status of other Maximizer users.

Links to access external links.

Administration to access administrative tasks.



Partner Access

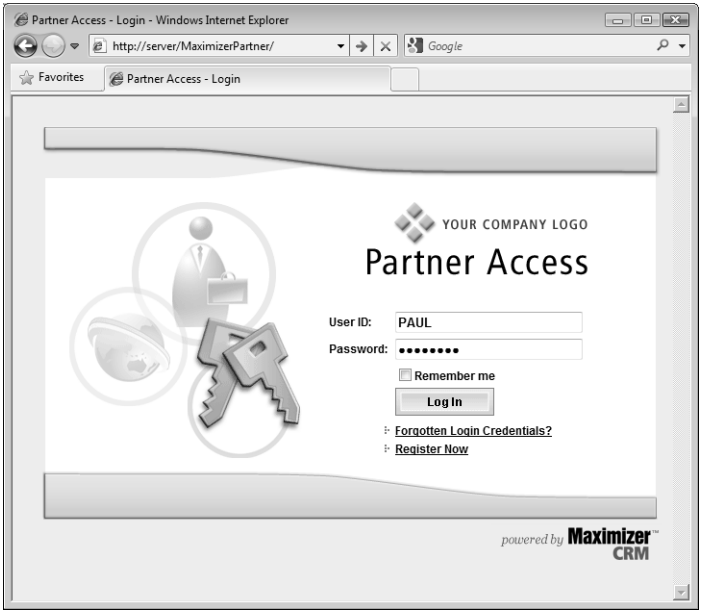
Maximizer users can access the sample Escona Tutorial Address Book using "Paul" as the user ID and "password" as the password.

Partner Access is a web application that creates a two-way flow of information between your organization and its business partners. Organizations with an extended sales force of resellers or dealers need a way to distribute and monitor sales opportunities to these partners. Partner Access allows business partners to access Address Book entries, sales opportunities, customer service cases, and news/events over the Internet.

Staff can publish news to the site. News items can be filtered for partners based on their interest areas.

Customer service cases may be associated with a Contact of a Company or an Individual. Partners (the Contact associated with the case) can then follow the progress of the case. Partners can also search the knowledge base for related articles.

Partners access Partner Access using the URL and setup PIN sent by email by the site administrator. See the *Maximizer CRM Administrator's Guide* for more information about setting up Partner Access.



Viewing and Modifying Address Book Entries

Partners can view and modify associated Address Book entries in the site.

➤ To view and modify Address Book entries

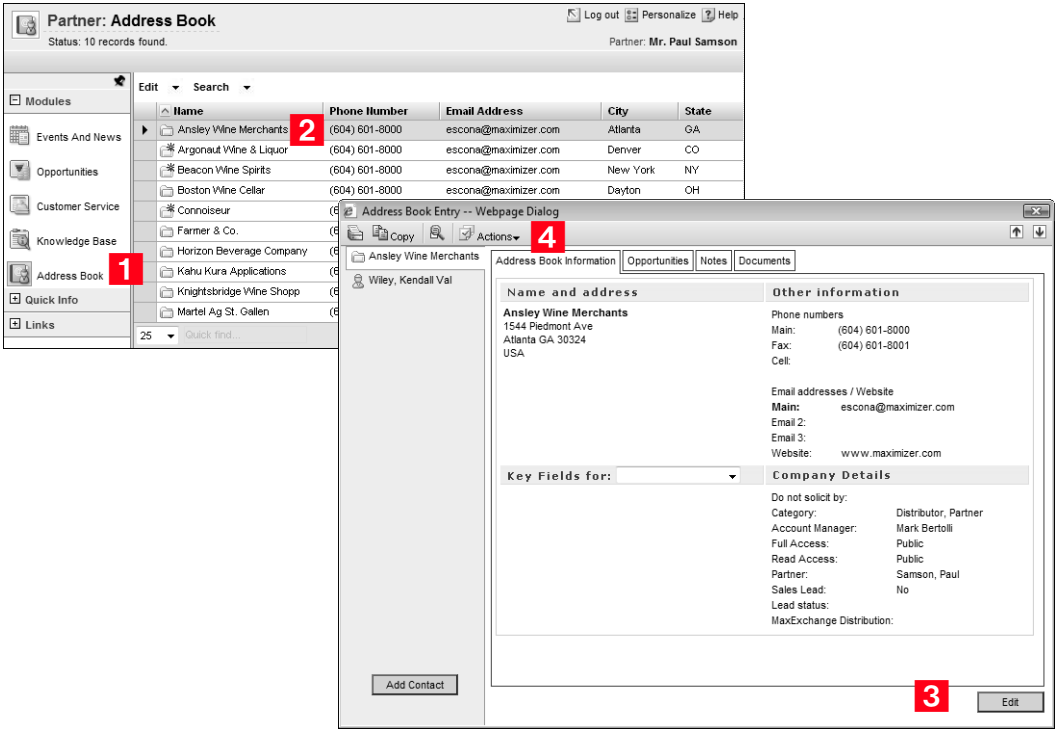
1. In Partner Access, click the **Address Book** icon.

   All the Address Book entries that are associated with a partner appear (these entries have the partner assigned to them in the Basic Information tab of an entry).

2. Click on an **Address Book entry** to open it.

3. Click **Edit** to make modifications to the entry.

4. Use the **buttons** on the menu bar to print a Detailed report, view the properties of the entry, copy information to the Windows clipboard, and create new opportunities.



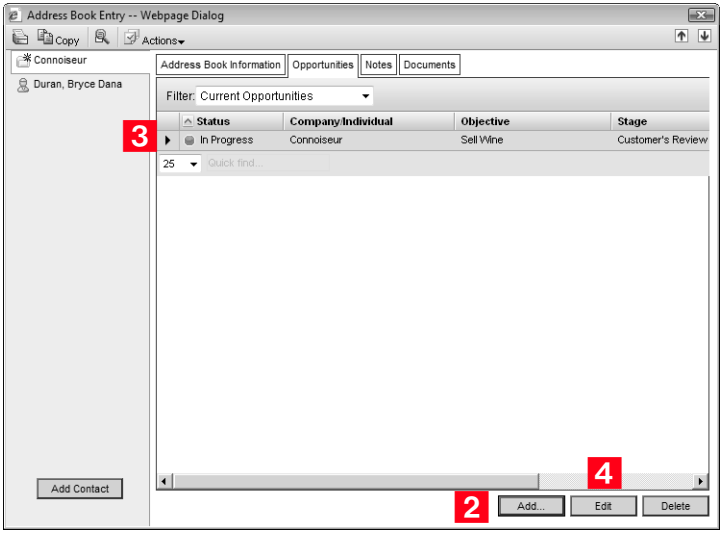
Working with Opportunities, Notes, and Documents

Opportunities are assigned to partners by selecting a partner on the Partner tab of the opportunity. Leads are assigned by assigning the partner to the lead on the Basic Information tab of the Address Book entry. Each time a partner is assigned an opportunity or a lead, the partner is notified by email.

Opportunities, notes, and documents for those Address Book entries can also be created, modified, or deleted (if provided the necessary right to do so). Partners may view and update opportunities that have been assigned to them in Maximizer. Assigned leads are also available to partners.

➤ To add and modify opportunities, notes, and documents

1. While an Address Book entry is open, click on the corresponding tab—**Opportunities**, **Notes**, or **Documents** tab.
2. Click **Add** to add a new opportunity, note, or document.
3. To open an **opportunity**, a **note**, or a **document**, click on it.
4. To edit an opportunity, a note, or document, click the **Edit** button.
5. Use the **Download** button to open a document.



Working with Customer Service Cases

Partners can view and enter cases in Partner Access. Cases can be limited by the site administrator to only those cases associated with the partner or to all cases in an Address Book.

➤ To view and enter cases

1. Open the Customer Service page by clicking on the corresponding icon.
2. To add a case, click **Edit** and choose **Create a Customer Service Case**. A **wizard** appears where you enter the case details.
3. To open a case, click on it.
4. To print a **detailed report** of the case, view the case **properties**, or view a **knowledge base article** associated with a case, click the corresponding button.
5. Click on the **Notes** and **Documents** tabs of a case to see the related notes and documents.

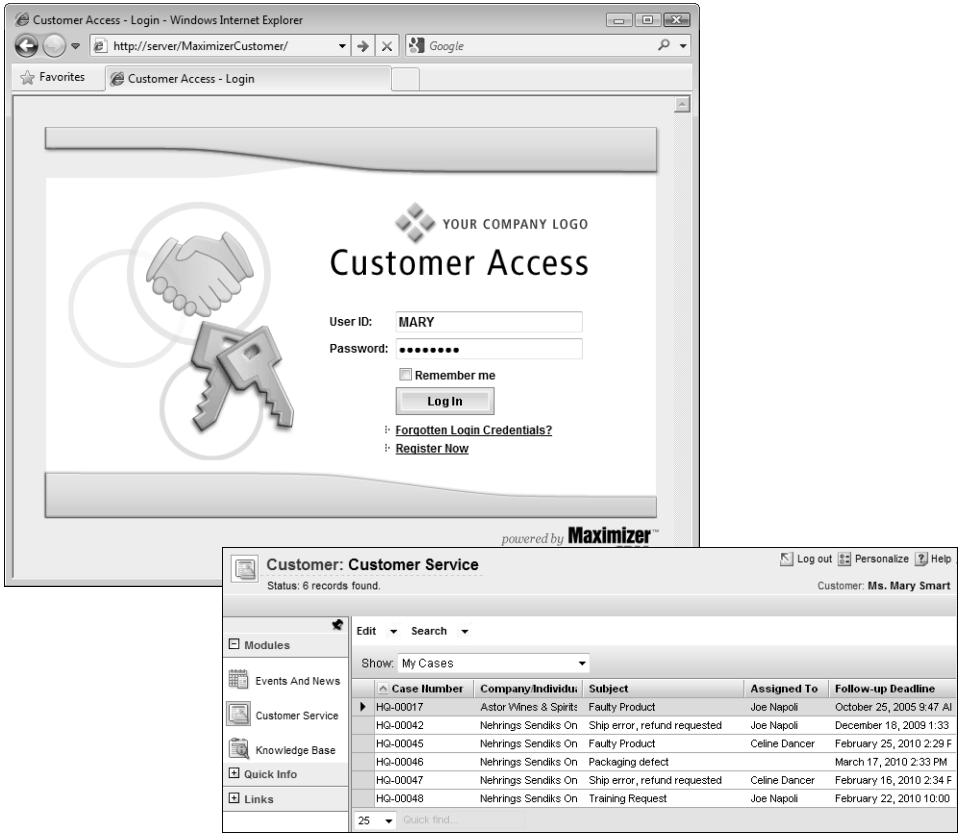
Customer Access

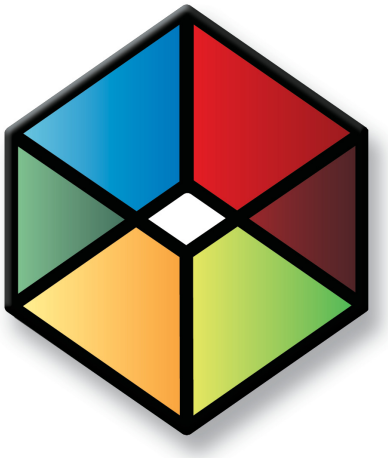
Maximizer users can access the sample Escona Tutorial Address Book using "Mary" as the user ID and "password" as the password.

Customer Access offers customers a number of web-based services. The site's functionality is very similar to Partner Access in that Customer Access can be customized to display information essential to your customers. Staff can publish to the site news such as new products or services; news items can be filtered for customers based on their interest areas.

Customers can follow the progress of their customer service cases and even enter cases if given the proper access rights by the site administrator. The knowledge base can also be searched for related articles. For more information, see "Partner Access" on page 275.

As with Partner Access, customers use the URL and setup PIN sent by email by the site administrator to access Customer Access. They then set up their own login information. See the *Maximizer CRM Administrator's Guide* for more information about setting up Customer Access.





CHAPTER 12

Wireless Access

Access Maximizer from Wireless Devices

In this chapter...

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"Accessing Address Book Entries" on page 285
"Modifying Entries" on page 290
"Sending and Saving Email Messages" on page 293
"Accessing Opportunities" on page 295
"Accessing Customer Service Cases" on page 300
"Accessing User-Defined Fields" on page 305
"Accessing Notes" on page 306
"Accessing Documents" on page 308
"Accessing Calendar Appointments and Hotlist Tasks" on page 309
"Accessing the Company Library" on page 313
"Using Favorite Lists" on page 316
"Viewing Dashboards" on page 317
"Setting Wireless Access Preferences" on page 318
"Creating Shortcuts to Wireless Access Sites" on page 319

Wireless Access

Wireless Access is installed as part of the Maximizer Components for IIS. Check with your system administrator for further information. Instructions for installing, enabling, and configuring Wireless Access are in the *Maximizer CRM Administrator's Guide*.

Wireless Access is a website that lets you access your Maximizer Address Books from wireless devices. You can access the following types of information in Wireless Access:

- Address Book information
- Opportunities
- Customer service cases
- Hotlist tasks and appointments
- User-defined fields
- Notes
- Company Library documents
- Dashboards

Depending on the type of device you are using, the screens and procedures may vary slightly.

Compatible Devices and Browsers

In order for Wireless Access to display properly on devices, you should enable JavaScript and HTML tables in your web browser.

Several devices are compatible with Wireless Access. Check with either Maximizer Software Inc. or your Business Partner for compatibility before deployment. Any HTML web browser is compatible with Wireless Access including the following:

- Go.Web for RIM devices
- Palm Web Pro for Palm devices
- Pocket Internet Explorer for Windows CE devices
- Opera for SmartPhones/PDAs
- Safari for Apple iPhone

Visit the Maximizer website at www.maximizer.com for the most up to date list of supported browsers.

Logging In to Wireless Access

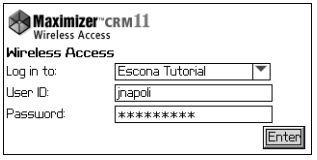
➤ To log in to Wireless Access

1. On your device, enter the URL for the site into your browser as follows:

   <Server Name>/MaximizerWireless

   e.g., http://wirelessweb.maximizer.com/maximizerwireless

2. Select the Address Book, enter your User ID and Password (Maximizer User ID and Password), and then click **Enter**.



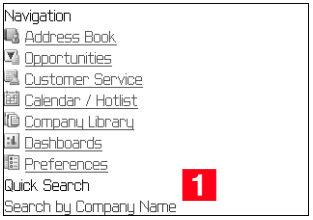
The Wireless Access home page appears.

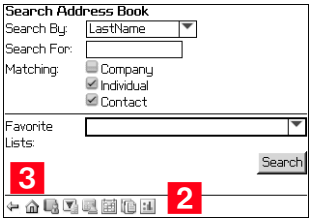
Navigating Pages

From each of the main Wireless Access pages, you can use the navigation footer to move to the Address Book, Opportunity, Customer Service, Calendar/Hotlist, and Company Library pages. You can also use the Back and Home buttons to navigate the site.

You can navigate pages in the following ways:

1. From the Wireless Access home page, click the associated link to access the Address Book, Opportunities, Customer Service, Calendar/Hotlist, Company Library, Dashboard and Preferences pages.
2. From the navigation footer on any of the main pages in Wireless Access, click the **Address Book**, **Opportunity**, **Customer Service**, **Calendar/Hotlist**, or **Company Library** icons.
3. Click the **Back** and **Home** icons to return to a previous page or go to the Wireless Access home page.

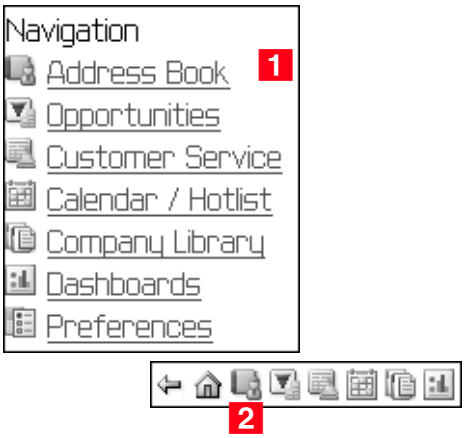




Accessing Address Book Entries

You can access the Address Book page in the following ways:

1. From the Wireless Access home page, click **Address Book**.
2. From the navigation footer on the main pages, click the **Address Book** icon.



Searching for Address Book Entries

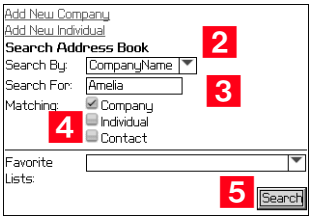
You can search for Address Book entries by last name, first name, company name, phone number, or email address in Wireless Access. You can also perform a Quick Search to search for Companies, Individuals, or Contacts directly from the main page. With the Quick Search you can search by Company name or by last name. You can also retrieve all Address Book entries in a Favorite List. See “Using Favorite Lists” on page 316 for more information.

➤ To search for Address Book entries

1. Open the Address Book page.
2. In the **Search By** drop-down list, select the field that you want to search for.
3. In **Search For** field, enter the text to search for.
4. In the **Matching** area, select the types of entries you want to retrieve—**Company**, **Individual**, or **Contact**.

5 Click **Search**.

The page displays a list of matching Address Book entries.

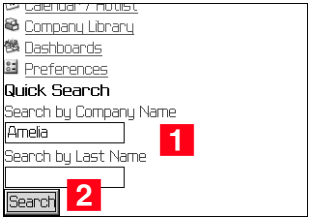


➤ To perform a Quick Search

1 In the **Search Company by Name** or **Search Person by Last Name** field on the Wireless Access home page, enter the name of the Company or person.

2 Click **Search**.

The page displays a list of matching Address Book entries.



Viewing Address Book Entries

You can view the details of existing Address Book entries in Wireless Access. You can access Address Book entries from searches, from Favorite Lists, or from open opportunities, customer service cases, appointments, and tasks associated with the Address Book entries.

➤ To view an Address Book entry

- After performing a search or retrieving a Favorite List, click on the entry to open it.

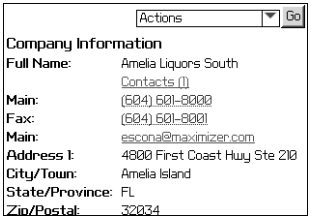
  – or –

- In an open opportunity, case, or appointment, click the link to the Address Book entry.

  – or –

- From the **Actions** drop-down list in an open task, click **View Company/Individual/Contact**.

  The page displays all the fields that have values for the Address Book entry.



Adding New Address Book Entries

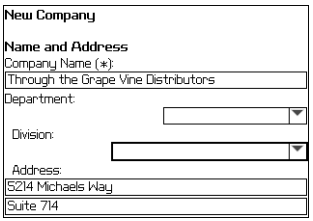
You can add new Companies and Individuals from the main Address Book page. You can add Contacts from existing Address Book entries.

➤ To add a Company or an Individual

1. From the Address Book page, click **Add New Company/ Individual**.

   The New Company or New Individual page opens.

2 Enter the basic information for the Company or Individual.



3 When you are finished, click **OK**.

The Company Information or Individual Information page opens displaying all the fields that have values for the Company or Individual.

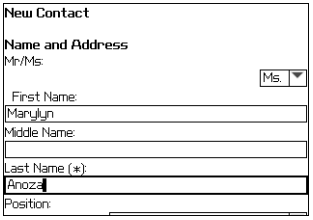
➤ To add a Contact

1 Open an existing Company or Individual.

2 From the **Actions** drop-down list, select **Add > Contact** and click **Go**.

The New Contact page opens.

3 Enter the basic information about the Contact.



4 When you are finished, click **OK**.

The Contact Information page opens displaying all the fields that have values for the Contact.

Phoning Address Book Entries

You can phone Address Book entries from the list of entries after performing searches or retrieving Favorite Lists or from open entries.

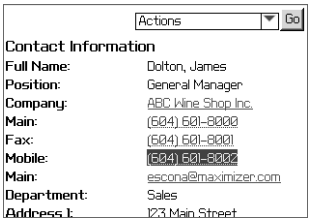
➤ To phone an Address Book entry

Entries' phone numbers are displayed only if the column setup includes a phone number field. Your administrator can specify the column setup used in Wireless Access.

- In a list of entries, click on the phone number next to the entry.

  – or –

  In an open entry, click on the phone number that you want to call. You can choose any phone number that's specified for the entry.



Drawing Maps

You can quickly draw a map showing the location of an Address Book entry or of the Address Book entry associated with an opportunity or customer service case.

➤ To draw a map of an Address Book entry

1. Open an Address Book entry, opportunity, or customer service case.
2. From the **Actions** drop-down list, select **Draw a Map** and click **Go**.
3. Choose an online map site and click **Go**.

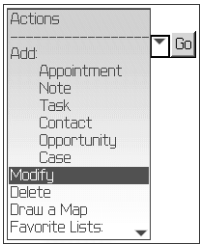
   The map to the Address Book entry's location appears.

Modifying Entries

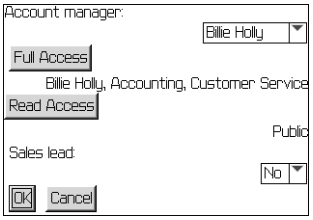
You can modify Address Book entries, opportunities, customer service cases, appointments, tasks, and notes in Wireless Access.

➤ To modify an entry

1. Open the entry.
2. From the **Actions** drop-down list, select **Modify** and click **Go**.



3. Modify any of the fields.
4. When you are finished, click **OK** to save the changes.



Associating Contacts with Entries

You can change the Contact associated with an existing opportunity or case or add a Contact to an opportunity or a case that is associated to only a Company or Individual.

➤ To associate a Contact with an entry

1. Open the entry.
2. From the **Actions** drop-down list, select **Edit > Contact** and click **Go**.

   The Modify Contact page opens showing the currently selected Address Book entry and Contact. You can search for other Contacts to associate with the entry.
3. In the **Search by** drop-down list, select **Last Name** or **Company**.
4. In the **Search for** field, enter the text to search for, and click **Search**.

   The page refreshes and displays the Contacts matching the search criteria.
5. Select the Contact, and click **OK**.

   The Contact is added to the entry.

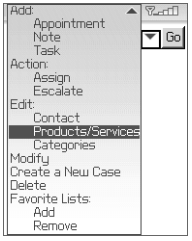
Selecting Products/Services and Categories

For more information on displaying products/services and categories see Maximizer Help and Administrator Help.

You can select products/services and categories for opportunities, customer service cases, and appointments.

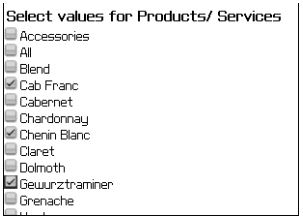
➤ To select products/services and categories for an entry

1. Open the entry.
2. From the **Actions** drop-down list, select **Edit > Products/ Services** or **Edit > Categories** and click **Go**.



The Select values for Products/Services or the Select values for Categories page opens.

3. Select values for the products/services or categories for the entry.



4. Click **OK**.

The items you select are displayed in the entry.

Sending and Saving Email Messages

In Wireless Access you can send email to Address Book entries and save the email messages in Maximizer. In addition to the typical email functionality of your wireless device, you can save email messages as notes or documents with Address Book entries.

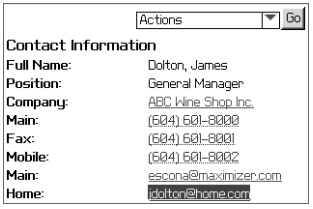
You can send email to Address Book entries in Wireless Access from open entries or from the list of entries after performing a search or retrieving a Favorite List.

➤ To send an email message to an Address Book entry

1. In a list of entries, click on the email address next to the entry. You can choose only the main email address for the entry.

– or –

In an open entry, click on an email address. You can choose any email address that's specified for the entry.

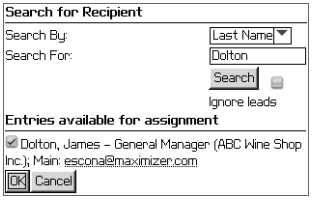


The Send Email page opens. By default, the current Address Book entry's email address is included in the To field.

2. To add additional Address Book entries, click the **To**, **Cc**, or **Bcc** button, and search the Address Book.
   - In the **Search by** drop-down list, select **Last Name** or **Company**.
   - In the **Search for** field, enter the text to search for, then click **Search**.

- In the **Entries available for assignment section**, select the Address Book entries that you want to add to the email.

Click **OK** when you are finished.



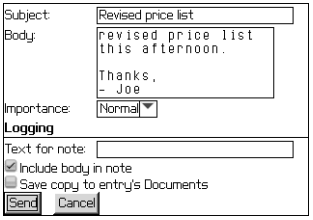
3 Specify a subject and body text for the email message.

4 In the **Logging** section, specify your logging options.

- Save body text of an email message that is sent to an Address Book entry as a note in the Notes window or as a document in the Documents window.
- Specify default text to be included as part of a note.

Your logging options for email must be enabled for notes in your user preferences in Maximizer (Preferences > Logging tab) for the logging options to work properly.

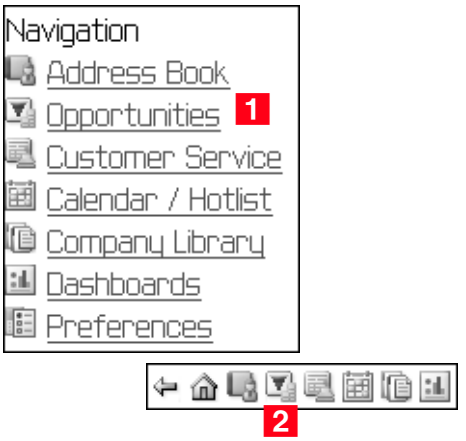
5 Click **Send**.



Accessing Opportunities

You can access the Opportunities page in the following ways:

1. From the Wireless Access home page, click **Opportunities**.
2. From the navigation footer on the main pages, click the **Opportunities** icon.



Searching for Opportunities

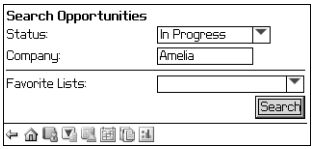
You can search for Opportunities by Company name and you can filter your searches by opportunity status in Wireless Access. You can also retrieve all opportunities in a Favorite List. See "Using Favorite Lists" on page 316 for more information.

➤ To search for an opportunity

1. Open the Opportunities page.
2. In the **Status** drop-down list, select the status of the opportunity or select **All Opportunities**.
3. In the **Company** field, specify the name of the company that the opportunity is associated with.

4 Click **Search**.

All opportunities matching the search criteria are displayed.



Viewing Opportunities

You can view the details of existing opportunities in Wireless Access. You can access opportunities from searches, from Favorite Lists, or from Address Book entries associated with the opportunities.

➤ To view an opportunity

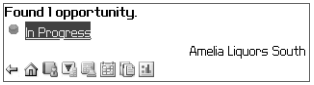
1 From the Opportunities page, perform a search or retrieve a Favorite List.

– or –

In the **View** section at the top of an open Address Book entry, click **Opps**.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Opps from the Actions drop-down list.

2 Click on the opportunity to open it.



The page displays all the fields that have values for the opportunity.

Adding New Opportunities

You can add new opportunities from Address Book entries or from existing opportunities. When you create a new opportunity from an existing one, the Address Book entry associated with the original opportunity is also associated with the new opportunity.

➤ To add a new opportunity

1. Open the existing entry.
2. From the **Actions** drop-down list in an Address Book entry, select **Add > Opportunity**, and click **Go**.

   – or –

   From the **Actions** drop-down list in an opportunity, select **Create a New Opportunity**, and click **Go**.
3. If Products/Services is a mandatory field, select the products/services for the opportunity, and click **Next**.
4. If Categories is a mandatory field, select the categories for the opportunity, and click **Next**.

   The remaining information is displayed. Mandatory fields are marked with asterisks (*).
5. Enter the remaining fields for the opportunity.
6. Click **OK** to save the opportunity.

   The opportunity is created.

In Wireless Access, you can associate Contacts, sales teams, leaders competitors, and partners to opportunities only after creating them. For more information, see the following sections:

- “Associating Contacts with Entries” on page 291
- “Assigning Sales Teams and Leaders to Opportunities” on page 298
- “Assigning Competitors and Partners to Opportunities” on page 298

Assigning Sales Teams and Leaders to Opportunities

You can assign sales teams to opportunities in Wireless Access. While selecting a sales team, you can also select a leader for the opportunity.

➤ To assign a sales team to an opportunity

1. Open the opportunity.
2. From the **Actions** drop-down list, select **Edit > Sales Team**, and click **Go**.

   The Select a sales team page opens.
3. From the **Sales team** drop-down list, select a sales team, and click **OK**.

   The Select an opportunity leader page opens. The designated team leader is selected by default.
4. Select a leader for the opportunity, and click **OK**.

   The opportunity is displayed with the Sales team and Leader fields updated.

Assigning Competitors and Partners to Opportunities

You can assign competitors and partners to opportunities in Wireless Access. You can select any Address Book entries as competitors and partners. But you can also filter the Address Book to display only entries that are designated as competitors or partners. You can also remove competitors and partners that are already assigned to opportunities.

➤ To assign a competitor or partner to an opportunity

1. Open the opportunity.
2. From the **Actions** drop-down list, select **Edit > Competitors** or **Edit > Partners** and click **Go**.

   The Search for Competitor or the Search for Partner page opens.

If the opportunity already has competitors or partners assigned to it, you can click the Remove button to choose competitors or partners to remove from the opportunity.

3. In the **Search by** drop down list, select **Last Name** or **Company**.
4. In the **Search for** field, enter the text to search for.
5. Select the **Ignore leads**, **Competitors only**, or **Partners only** options to refine the search.

6. Click **Search**.

   All matching Address Book entries are retrieved.

7. Select the entry and click **OK**.

   The opportunity is displayed with the Competitors or the Partners section updated.

Changing the Status of Opportunities

You can change the status of opportunities in Wireless Access. Changing the status lets you complete your current opportunities.

➤ To change the status of an opportunity

1. Open the opportunity.
2. From the **Actions** drop-down list, select **Edit > Status**, and click **Go**.

   The Current working status page opens.

3. Select the new status of the opportunity, and click **OK**.

   If the new status completes the opportunity, the Completion details page opens. Otherwise, the opportunity is saved with the new status.

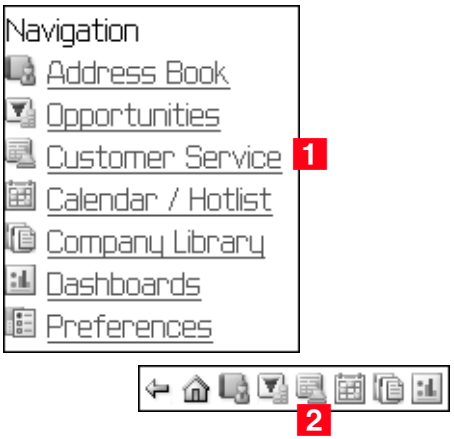
4. Enter the details for the opportunity completion. Mandatory fields are marked with asterisks (*).
5. Click **OK**.

   The opportunity is displayed with the Status section updated.

Accessing Customer Service Cases

You can access the Customer Service page in the following ways:

1. From the Wireless Access home page, click **Customer Service**.
2. From the navigation footer on the main pages, click the **Customer Service** icon.



Searching for Cases

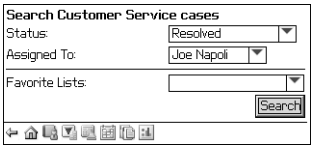
To view customer service cases, you can search by the case status and by the assigned user. You can also retrieve a Favorite List. For more information on Favorite Lists see "Using Favorite Lists" on page 316.

➤ To search for a case

1. Open the Customer Service page.
2. In the **Status** drop-down list, select the status of the case that you want to retrieve or select **All Cases**.
3. In the **Assigned to** drop-down list, select the Maximizer user that the case is assigned to, or select the empty field to retrieve cases assigned to all users.

4 Click **Search**.

The page displays all cases matching the search criteria.



Viewing Cases

You can view the details of existing customer service cases in Wireless Access. You can access cases from searches, from Favorite Lists, or from Address Book entries associated with the cases.

➤ To view a case

1 From the Customer Service page, perform a search or retrieve a Favorite List.

– or –

In the **View** section at the top of an open Address Book entry, click **Cases**.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Cases from the Actions drop-down list.

2 Click on the case to open it.

The page displays all of the fields that have values for the case.

Adding New Cases

You can add new cases from Address Book entries or from existing cases. When you create a new case from an existing case, the Address Book entry associated with the original case is also associated with the new case.

➤ To add a new case

1. Open the existing entry.
2. From the **Actions** drop-down list in an Address Book entry, select **Add > Case** and click **Go**.

   – or –

   From the **Actions** drop-down list in a case, select **Create a New Case**.

   The Select Values for Products/Services page opens.
3. Select the Products/Services for the case, and click **Next**.

   If Category is a mandatory field, the Select Values for Categories page opens. If Category is not a mandatory field, skip to Step 5.
4. Select the Categories for the case, and click **Next**.

   The remaining information is displayed. Mandatory fields are marked with asterisks (*).
5. Enter the remaining fields for the case.
6. Click **OK** to save the case.

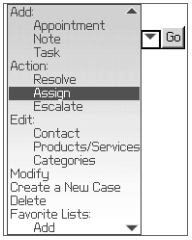
You can associate a Contact with the case only after creating the case. For more information, see "Associating Contacts with Entries" on page 291.

Assigning, Escalating, and Resolving Cases

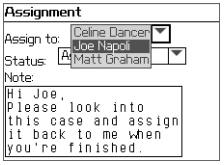
You can assign, escalate, and resolve customer service cases in Wireless Access. When you assign cases, you can reassign the cases to any customer service team member. When you escalate cases, you can reassign the cases to only managers. When you resolve cases, you can specify billing information. You can automatically notify the assigned user, the case owner, and the Address Book entry when the case is reassigned or resolved. And you can create a Hotlist task to check on the case when the case is reassigned.

➤ To assign, escalate, or resolve a case

1. Open the case.
2. From the **Actions** drop-down list, select **Action > Resolve/ Assign/Escalate** and click **Go**.

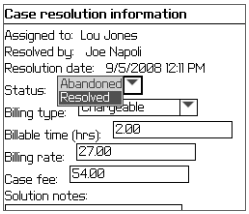


3. In the **Assignment** area, select the Maximizer user that you are assigning the case to, select the status of the case, and enter a note to accompany the case.



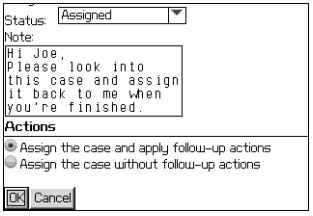
– or –

In the **Case Resolution Information** area, select the status of the case, specify the billing information, and enter a note to accompany the case.



4 In the **Actions** area, specify whether or not you want to apply a follow-up action.

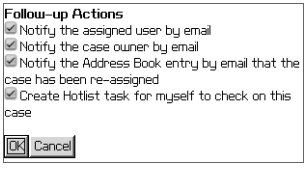
5 Click **OK**.



If you select to assign/escalate/resolve the case without a follow-up action, the changes are saved to the case.

If you select to apply a follow-up action, the Follow-up Actions page opens.

6 Select the follow-up actions that you want to apply to the case—**Notify the assigned user by email**, **Notify the case owner by email**, **Notify the Address Book entry by email**, or **Create Hotlist task for myself to check on this case**.


Follow-up Actions
Notify the assigned user by email
Notify the case owner by email
Notify the Address Book entry by email that the case has been re-assigned
Create Hotlist task for myself to check on this case
OK
Cancel

7 Click **OK**.

The changes are saved to the case and the selected actions are automatically applied.

Accessing User-Defined Fields

You can view and modify user-defined fields associated with Address Book entries, opportunities, and customer service cases.

➤ To view and modify user-defined fields

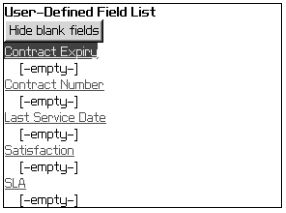
1. Open the entry.
2. In the **View** section at the top of the entry, click **UDFs**.

   The User-Defined Field List page opens. The list may be empty if values are not yet selected for any of the entry's user-defined fields.
3. To view the blank user-defined fields click **Show blank fields**.

   The list displays all user-defined fields for the type of entry.
4. To modify a user-defined field, click on the user-defined field. Then, enter or select a new value, and click **OK**.

   The user-defined field is updated.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > UDFs from the Actions drop-down list.

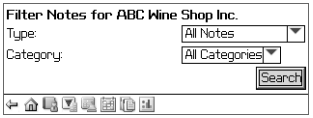


Accessing Notes

You can access notes associated with Address Book entries, opportunities, and customer service cases in Wireless Access.

➤ To view a note

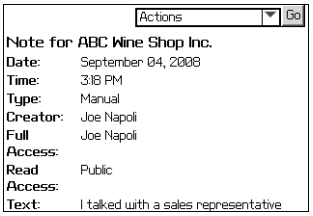
1. Open the entry.
2. In the **View** section at the top of the entry, click **Notes**.
3. In the **Type** drop-down list, select the type of note that you want to view, or select **All Notes**.
4. In the **Category** drop-down box, select the category that the note belongs to, or select **All Categories**.



5. Click **Search**.

   Notes matching the search criteria are returned. For long lists, you can click Next or Previous at the bottom of the page to view more notes.

6. Click on the note to view its details.



The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Notes from the Actions drop-down list.

Adding Notes

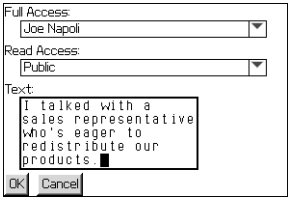
You can add new notes to existing Address Book entries, opportunities, and customer service cases.

➤ To add a note

1. Open the entry.
2. From the **Actions** drop-down list, select **Add > Note**.

   The New Note page opens.
3. In the **Full Access** and **Read Access** drop-down lists, select the user or group that has access rights to the note, or select **Public** to give full access or read access to all Maximizer users.

   You can also change the date and time of the note and assign a category to the note.
4. In the **Text** field, enter the text for the note.
5. Click **OK** to save the note.



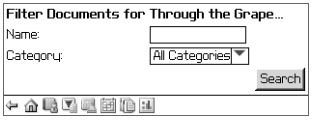
Accessing Documents

You can access documents attached to Address Book entries, opportunities, and customer service cases in Wireless Access.

➤ To access a document attached to an entry

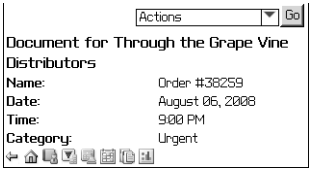
1. Open the entry.
2. In the **View** section at the top of the entry, click **Docs**.
3. In the **Name** field, enter the name of the document. Or leave the field blank to retrieve all documents.
4. In the **Category** drop-down list, select the document's category. Or select **All Categories**.
5. Click **Search**.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Docs from the Actions drop-down list.



Documents matching the search criteria are returned. For long document lists, you can click Next or Previous at the bottom of the page to view more documents.

6. Click on the document to view its details.

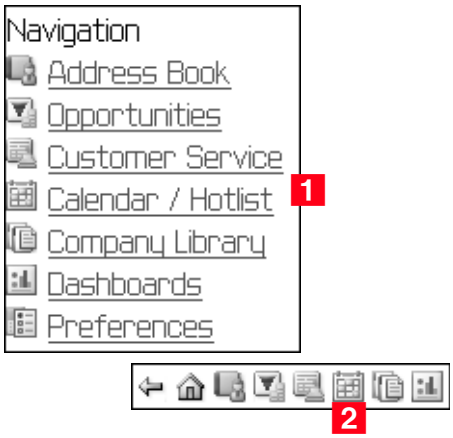


Once the document entry is open, you can use the Actions drop-down list to delete it and send it by email. For more information on sending email in Wireless access, see "Sending and Saving Email Messages" on page 293.

Accessing Calendar Appointments and Hotlist Tasks

You can access the Calendar / Hotlist page in the following ways:

1. From the Wireless Access home page, click **Calendar / Hotlist**.
2. From the navigation footer on the main pages, click the **Calendar / Hotlist** icon.

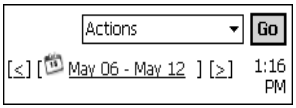


Viewing the Calendar

The default calender view follows the settings in the Calendar/Hotlist preferences in Maximizer. If the default calendar view in Maximizer is monthly or weekly list, the default calendar view in Wireless Access is set to weekly.

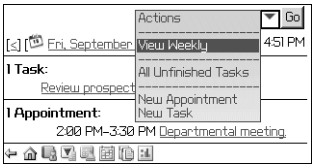
You can view the Calendar/Hotlist in Daily or Weekly view mode. Use the back and forward arrows to move between days or weeks.

You can also go directly to a specific date or week by using the Date Picker. To open the Date Picker, click the date link below the Actions drop-down list.



➤ To change the calendar view

1. Open the Calendar/Hotlist.
2. From the **Actions** drop-down list, select **View Daily** or **View Weekly** and click **Go**.



Viewing Appointments and Tasks

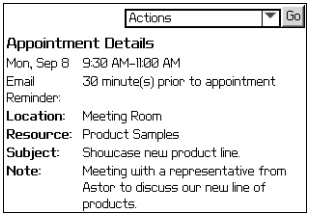
You can view the details of appointments and tasks in Wireless Access. You can access appointments and tasks from the Calendar or from Address Book entries, opportunities, or customer service cases associated with the appointments and tasks.

➤ To view an appointment or task

1. Open the Calendar/Hotlist.
2. Locate the appointment or task in the **Daily** or **Weekly** view.
3. Click the appointment or task that you want to view.

   The page displays details of the appointment or task.

To go back to the calendar view, click the Back icon.


Actions
Go
Appointment Details
Mon, Sep 8 9:30 AM-11:00 AM
Email Reminder: 30 minute(s) prior to appointment
Location: Meeting Room
Resource: Product Samples
Subject: Showcase new product line.
Note: Meeting with a representative from Astor to discuss our new line of products.

➤ To view an appointment or task associated with an entry

1. Open the entry.
2. In the **View** section at the top of the entry, click **Appts** or **Tasks**.

   All appointments or tasks associated with the entry are displayed.
3. Click the appointment or task that you want to view.

   The page displays details of the appointment or task.

   In appointments, the **Appt with:** section displays all Address Book entries assigned to the appointment. Entry information includes name, phone number, and email address.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Appts/Tasks from the Actions drop-down list.

Adding Appointments and Tasks

You can add personal appointments or tasks. And you can add appointments or tasks associated with Address Book entries or customer service cases.

When you add an appointment, the Date, From, and Until fields are filled in automatically, but you can change them if necessary. The Subject field is mandatory and cannot be left blank.

➤ To add a personal appointment or task

1. Open the Calendar.
2. From the **Actions** drop-down list, select **New Appointment/ Task** and click **Go**.
3. Enter the appointment or task details and click **OK**.

➤ To add an appointment or task associated with an entry

1. Open the entry.
2. From the **Actions** drop-down list, select **Add > Appointment/Task** and click **Go**.
3. Enter the appointment or task details and click **OK**.

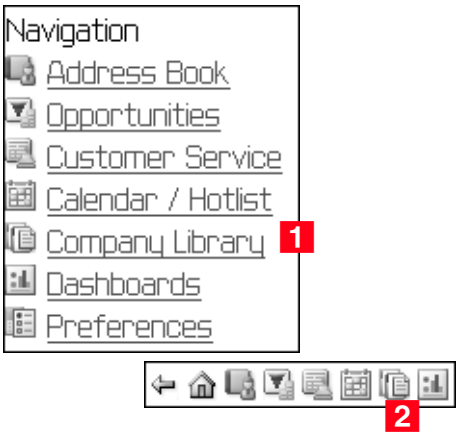
When you create an appointment for a Contact, a link is added to the Contact's email address in the appointment details. Click the link to compose an email message to the Contact. See "Sending and Saving Email Messages" on page 293 for more information.

If your device supports automatic dialing, you can click the Contact's phone number in the appointment details to make a call. See "Phoning Address Book Entries" on page 289 for more information.

Accessing the Company Library

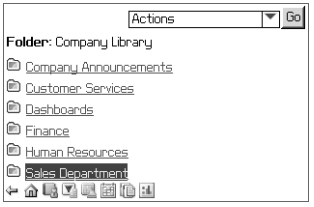
You can access the Company Library page in the following ways:

1. From the Wireless Access home page, click **Company Library**.
2. From the navigation footer on the main pages, click the **Company Library** icon.



➤ To browse in the Company Library

1. Click on a folder to open it and display its contents.



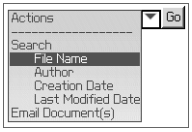
2. In the folder path, click on a parent folder to navigate to a folder further up in the hierarchy.

Searching for Documents in the Company Library

You can search for Company Library documents by file name, author, creation date, and last modified date. You can search the entire Company Library or you can search a specific folder.

➤ To search for a document in the Company Library

1. Open the Company Library page.
2. To narrow your search to a specific folder, navigate to the folder.
3. From the **Actions** drop-down list, select the type of search you want to perform—**File Name**, **Author**, **Creation Date**, or **Last Modified Date**, and click **Go**.



The Document Search page opens.

4. Specify the search criteria.
5. In the **Scope of Search** area, choose either to search the entire Company Library or to search only the current folder. Click **OK**.

The search results are displayed.

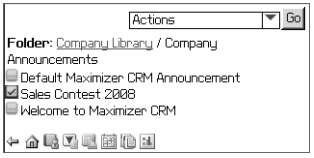
Actions
Go
Document search result
Company Library / Company Announcements / Sales Contest 2008
Company Library / Dashboards / Sales Dashboard
Company Library / Sales Department / Sales plan

Sending Company Library Documents to Address Book Entries

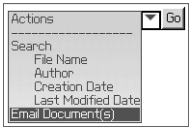
You can send Company Library documents to Address Book entries by email in Wireless Access.

➤ To send Company Library documents

1. In the Company Library page, select the documents that you want to send.



2. From the **Actions** drop-down list, select **Email document(s)** and click **Go**.



   The Send Email page opens with the documents attached to the email message.

3. Specify the recipient, the subject, the body, and the logging options for the email message.

   See “Sending and Saving Email Messages” on page 293 for more information.

4. Click **Send**.

Using Favorite Lists

To modify a Favorite List you must have the necessary access rights.

You can access Favorite Lists from the Address Book, Opportunities, and Customer Service pages. You can also modify Favorite Lists by adding or removing entries.

➤ To access a Favorite List

- In the Address Book, Opportunities, or Customer Service page, select a Favorite List from the **Favorite Lists** drop-down list and click **Search**. The entries for the Favorite List are displayed.

➤ To add an entry to a Favorite List

1. Open the entry that you want to add to the Favorite List.
2. From the **Actions** drop-down list, select **Favorite Lists > Add** and click **Go**.

   The Add current entry to Favorite List page opens.
3. Select the Favorite List you want to add the entry to, and click **OK**.

   The entry is added to the Favorite List.

➤ To remove an entry from a Favorite List

1. Open the entry that you want to remove from the Favorite List.
2. From the **Actions** drop-down list, select **Favorite Lists > Remove** and click **Go**.

   The Remove current entry from Favorite List page opens.
3. Select the **Favorite List** you want to remove the entry from, and click **OK**.

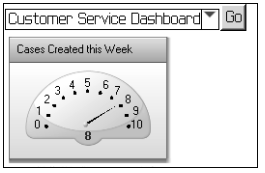
   The entry is removed from the Favorite List.

Viewing Dashboards

You can view dashboard in Wireless Access. If an indicator in a dashboard is configured with a Click Through to a Maximizer list or to another dashboard, you can click the indicator to view more information.

➤ To view a dashboard in Wireless Access

1. On the Wireless Access home page, click **Dashboard**.
2. Select a dashboard from the drop-down list and click **Go** to view a different dashboard.



Setting Wireless Access Preferences

You can change your navigation preferences from the Preferences page in Wireless Access. The navigation preferences determine if the view actions are displayed as links or displayed in the Actions drop-down list.

➤ To change the navigation preferences

1. On the Wireless Access home page, click **Preferences**.
2. Under **Wireless Access preferences**, click **Navigation**.
3. Select or clear the **Display View actions as links** option.
   - To display the actions as links in open entries, select the option.
   - To display the actions in the Actions drop-down list, clear the option.
4. Click **OK**.

Creating Shortcuts to Wireless Access Sites

You can create shortcuts to specific Wireless Access sites on your BlackBerry device. You can set up multiple shortcuts to different sites and Address Books. The shortcuts take you directly to the Wireless Access home page without requiring that you enter your login credentials. You can access the shortcuts from a program installed on your BlackBerry device.

Installing the Wireless Access Shortcuts Application

You can download the Wireless Access Shortcuts application from the Wireless Access home page.

The Wireless Access server must be configured properly before installing the Wireless Access Shortcuts application on devices. See the *Maximizer CRM Administrator's Guide* for more information.

➤ To install the Wireless Access Shortcuts application

1. On the Wireless Access home page, click **Create shortcut on your Blackberry device**.

   The Shortcut to Wireless Access page opens with information about the application.

   The page displays the URL of the current site and the database name of the current Address Book. You must supply this information when you set up the shortcuts.

2. Click **Download the shortcut creation application**.

   The Wireless Access Shortcuts application is installed on your BlackBerry device.

Adding Shortcuts to Wireless Access Sites

You can add shortcuts to Address Books on Wireless Access sites from the Wireless Access Shortcuts application installed on your BlackBerry device. While setting up shortcuts, you must supply the URL of the Wireless Access site and the database name of the Address Book. You can view this information for the current Address Book while installing the Wireless Access shortcut application from the Wireless Access home page.

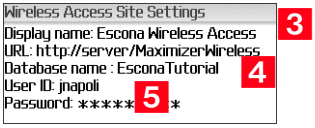
➤ To add a shortcut to a Wireless Access site

1. On your BlackBerry device, select the **Wireless Access Shortcuts** icon.

   The Wireless Access Shortcuts application opens.

2. Click the **Menu** key, and select **Add**.

3. In the **Display Name** field, enter a name for the shortcut.
4. Enter the **URL** of the site and the **database name** of the Address Book.
5. Enter your **user ID** and **password**.
6. Click the **Menu** key, and select **Save**.



Opening Wireless Access Sites from Shortcuts

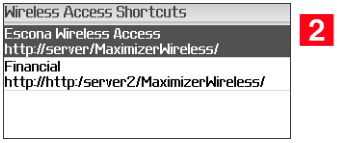
After setting up the shortcuts, you can quickly open an Address Book in Wireless Access from the shortcut program on your BlackBerry device.

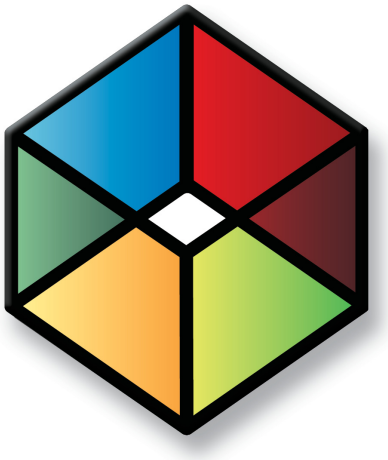
➤ To open a Wireless Access site from a shortcut

1. On your BlackBerry device, select the **Wireless Access Shortcuts** icon.

   The Wireless Access Shortcuts application opens.
2. Select a shortcut.

   The selected Wireless Access site opens directly to the home page.





CHAPTER 13

Customizing Maximizer

Customize Maximizer to suit your needs

In this chapter...

"Preferences" on page 322
"Customizing the Interface" on page 324
"Custom Actions" on page 327
"Web Inquiry Forms for Websites" on page 332
"Income and Expenses" on page 335

Preferences

You can personalize how Maximizer works for you. Maximizer provides you with various settings that give a great deal of flexibility in how you work—in other words, Maximizer adapts to the way you want to work.

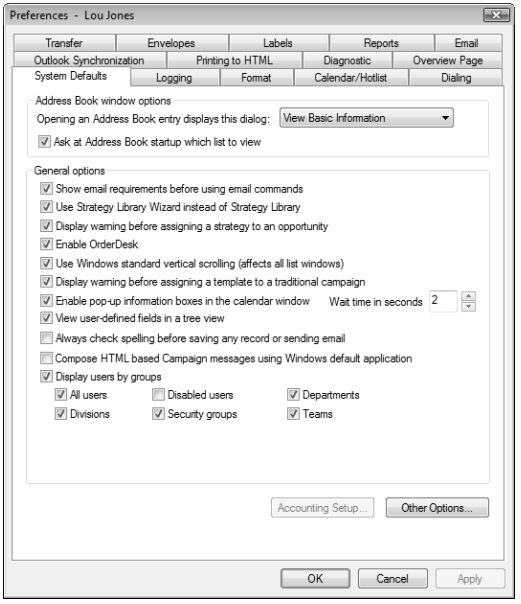
➤ To set your Maximizer preferences

1. On the **Setup** tab, select **Preferences**.

   The Preferences dialog box opens.

2. Select the tab for the settings you want to edit.

   - Select **System Defaults** to specify default settings and Microsoft Outlook integration options.
   - Select **Logging** to specify how notes are logged for various actions.
   - Select **Format** to specify date and address formats.
   - Select **Calendar/Hotlist** to specify the default settings and access rights for the calendar and Hotlist.
   - Select **Dialing** to specify settings for dialing phone calls from Maximizer.
   - Select **Transfer** to specify settings for transferring information between Address Books.
   - Select **Envelopes**, **Labels**, or **Reports** to specify settings for printing envelopes, labels, and reports from Maximizer.
   - Select **Email** to specify the default settings for sending email and the email server.
   - Select **Outlook Synchronization** to specify settings for synchronizing Address Book information with Microsoft Outlook.
   - Select **Printing to HTML** to specify settings for creating HTML files from Maximizer information.
   - Select **Diagnostic** to specify settings for logging error messages.
   - Select **Overview Page** to specify options for the My Work Day page.



3 Edit the settings and click **OK** to save the changes.

Customizing the Interface

You can customize the basic Maximizer interface in a number of ways. You can select the layout of the main window. You can adjust the properties of the icon bar containing the icons linking to the main Maximizer windows.

The following sections contain information on customizing the Maximizer interface:

- "Window Layout" on page 324
- "Adjusting the Icon Bar" on page 325
- "Customizing the Quick Access Toolbar" on page 326

Window Layout

You can control what windows are displayed and how they are laid out. On the Setup tab, you can select Window > Window Settings from the Workspace group to select one of the Maximizer window views—Classic, Outlook Style, and Custom.

- **Classic** displays the following windows below the controlling (main) windows. This setting is Maximizer's default window layout.
- **Outlook Style** is somewhat similar to Microsoft Outlook's display. The controlling windows form the left pane while the following windows occupy the top-right and bottom-right panes.
- **Custom** allows you to control what windows are displayed. For example, use this option if you want only the Address Book and Calendar windows open, without their following windows open. Open the windows you want using the icons on the icon bar or the Switch Windows commands. (On the View tab, select Switch Window from the Window group.) Then, tile the windows. (On the Setup tab, select Window > Window Management from the Workspace group, and select an option.) Of course, you can manually size any window.

You can also control such things as the colors, fonts, and grid lines in your windows. (On the Setup tab, select Window > Window Settings from the Workspace group, and choose Set Color or Set Font.)

Adjusting the Icon Bar

You can adjust the icon bar properties and also choose the state of the icon bar's visibility.

➤ To adjust the icon bar

1. On the **Setup** tab, select **Icon Bar** from the **Workspace** group.

   The Icon Bar Properties dialog box opens.

2. In the **General** area, set the default properties of the icon bar:
   - Select the **Visible** option to display the icon bar in the Maximizer window.
   - Select the **Display tooltips** option to show information about each icon when you pass the mouse pointer over it.
3. Set the icon size to **Small** or **Large**.
4. Set the location of the icon bar.
   - The **Floating** option allows you to place the icon bar anywhere inside the Maximizer window.
   - The **Docked at left** and **Docked at right** options place the icon bar on the left or right side of the Maximizer window.
5. In the **Set button order** area, select the icons you want to be displayed.

   Use the **Move Up** and **Move Down** buttons to position the icons.
6. In the **Recent entries list** area, set the number of entries to be displayed.

   To hide the section, clear the **Show Recent Entries list** option.

7 Click **OK**.

Customizing the Quick Access Toolbar

The Quick Access toolbar is located directly above or below the ribbon. You can click the arrow button next to the toolbar to add or remove the default commands on the toolbar. You can also add any other command from the ribbon, from sub-menus, or from the icon bar to the Quick Access toolbar.

➤ To add a command to the Quick Access toolbar

- Right-click on the command, and select **Add to Quick Access Toolbar**.

➤ To customize the Quick Access toolbar

1 Right-click anywhere in the ribbon, and select **Customize Quick Access Toolbar**.

The Customize Quick Access Toolbar dialog box opens.

2 From the **Choose commands from** drop-down list, select the location of a command to add to the toolbar.

You can select a tab, the icon bar, or the Maximizer menu that displays when you click the Maximizer button.

3 Select a command, and click **Add**.

You can also select <Separator> to add a separator between commands.

4 Repeat steps 2 and 3 to add more commands to the toolbar.

5 To move a command on the toolbar, select the command on the right, and click the arrow buttons to move the command up or down in the list.

6 When you are finished, click **OK** to save the changes to the Quick Access toolbar.

Custom Actions

Custom actions are commands that you can set up and personalize and then access from the Custom Actions tab. You can create the following types of custom actions:

- **Browse a website –** Open a specific website or HTML document.
- **Open a document or run an application –** Open a document or file, or run an external application such as a word processor, spreadsheet, or graphics program.
- **Start a user-defined field for an Address Book entry –** Treat the value of an alphanumeric user-defined field as the fully qualified name of a document or an application to open or start.

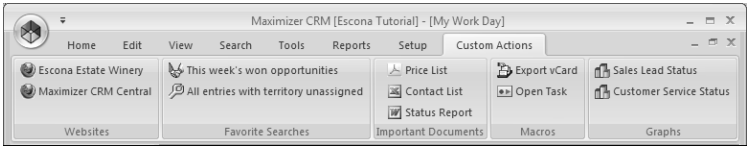
  For example, you could use an alphanumeric user-defined field to record a secondary web site for an Address Book entry. When you access the command, you can open the current Address Book entry's secondary website in your browser.
- **Run a Maximizer macro –** Run an existing Maximizer macro.
- **Draw a graph from a defined graph catalog –** View an existing graph in the graph catalog.
- **Retrieve a search catalog –** Retrieve an existing saved search from the search catalog in the Address Book, Opportunities, Campaigns, or Customer Service window.

The following sections contain information on custom actions in Maximizer:

- “Custom Actions Tab” on page 328
- “Creating Custom Actions Groups” on page 328

Custom Actions Tab

You can access your custom actions from the Custom Actions tab. The custom actions are arranged into groups. When you set up your custom actions, you create the groups and add each action to an existing group. Custom toolbars created in previous versions of Maximizer are converted into groups on the Custom Actions tab. The Custom Actions tab is visible only after you create a custom actions group.



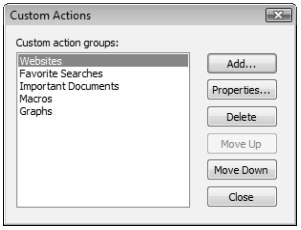
Creating Custom Actions Groups

You can create groups in the Custom Actions tab to perform personalized actions such as launching another application or performing a specific search that was saved in your search catalog.

➤ To create a group in the Custom Actions tab

1. On the **Setup** tab, select **Custom Actions** from the **Workspace** group.

   The Custom Actions dialog box opens.

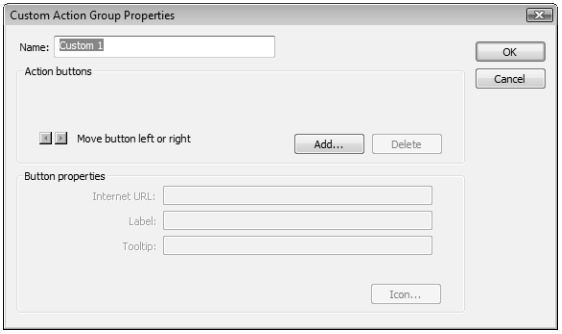


2. To create a new custom actions group, click **Add**.

   – or –

   To add a button to an existing custom actions group, select the existing group, and click **Properties**.

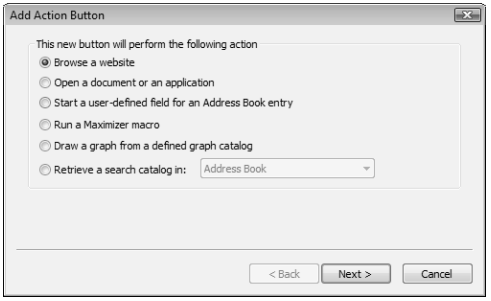
   The Customize Action Group Properties dialog box opens.



3 Enter a name for the group, and click **Add** to add a command to the group.

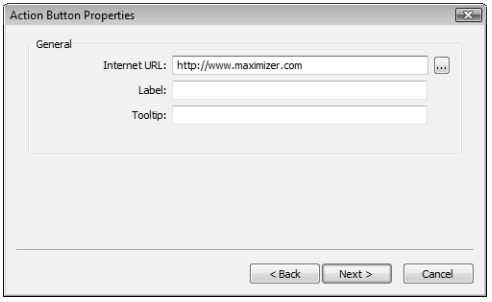
The Add Action Button dialog box opens.

4 Under **This new button will perform the following action**, select the main action, and click **Next**.


Add Action Button
This new button will perform the following action
Browse a website
Open a document or an application
Start a user-defined field for an Address Book entry
Run a Maximizer macro
Draw a graph from a defined graph catalog
Retrieve a search catalog in:
Address Book
< Back
Next >
Cancel

5 Specify the details of the custom action.

- If you chose **Browse a website** or **Open a document or an application**, click **Browse** to locate the document/application to run, or enter the URL or the path to the document/application.



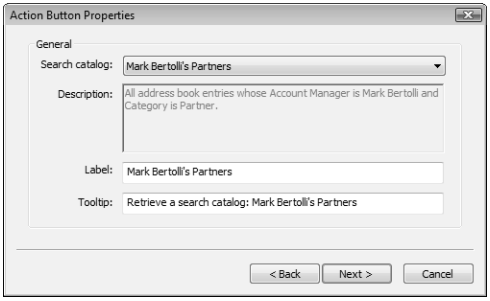
If you select a document, it opens in the default application for the type of document. To open the document with another application, specify the path to the application enclosed in double quotes, enter a space, then specify path to the file.

For example, to launch WordPad and open the file Notes.txt, in the Document/Application text box type the following:

"C:\ProgramFiles\Accessories\WordPad.exe" C:\Notes.txt

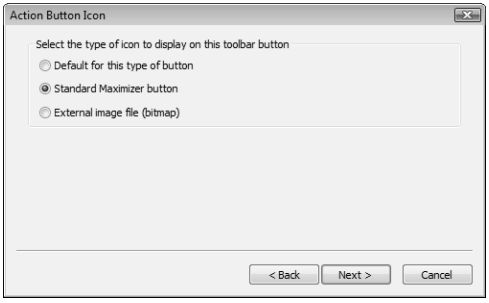
To load a new instance of an already running program, select the **Load new instance** checkbox.

- If you chose any other item, select the specific user-defined field, macro, graph, or search from the drop-down list.



6. Enter the **Label** and **Tooltip**, and click **Next**.

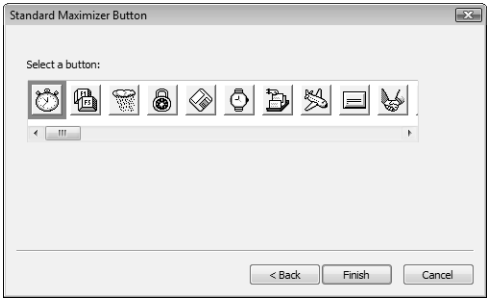
7. Select the type of button you would like to display for the command, and click **Finish** or **Next** depending on the option you choose.


Action Button Icon
Select the type of icon to display on this toolbar button
Default for this type of button
Standard Maximizer button
External image file (bitmap)
< Back
Next >
Cancel

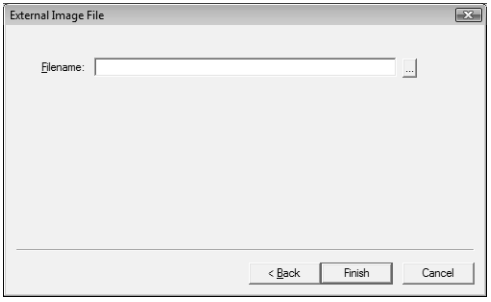
If you chose to display the default button, Maximizer selects the button automatically, and you can skip to step 9.

8. Select the image to use for the custom action, and click **Finish**.

- If you chose to use a standard Maximizer button, select one of the available buttons.

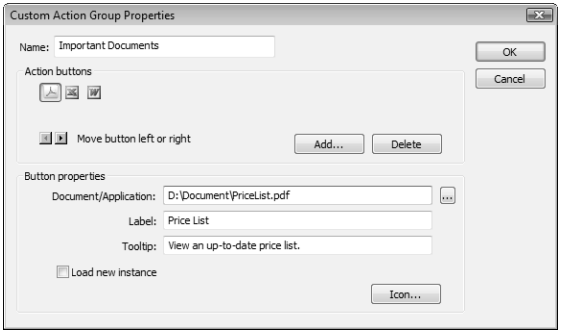


- If you chose to use an external image file (bitmap), locate the image using the ellipsis button.



9 To add another custom action to the group, return to step 3 and repeat the steps for the next custom action.

10 If desired, change the position of the new command in the group using the arrows, and click **OK** to save the group.



Web Inquiry Forms for Websites

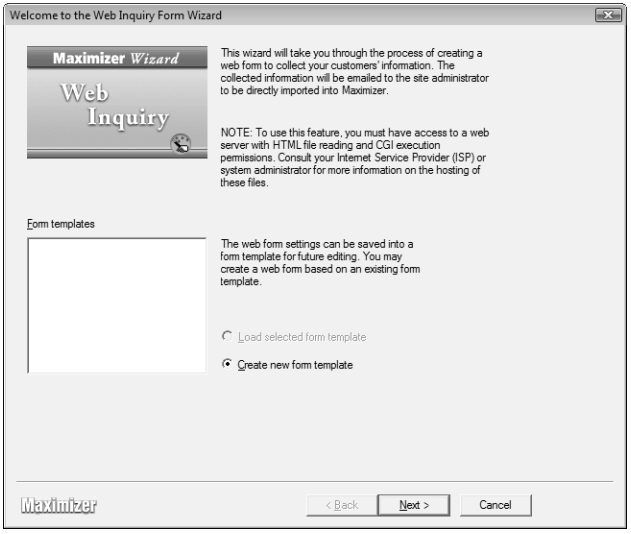
Maximizer can help you create an inquiry form to collect pertinent information from your website visitors. The collected information is sent to the specified email addresses as an .MTI or .XML file and then imported directly into Maximizer as Address Book entries by double-clicking on the file. You can also use a direct import (direct insert) of information.

You can create web inquiry forms with the Web Inquiry Form wizard. You can use the wizard for the following tasks:

- Save the web form settings as a template for future editing, so you can customize the form as the need arises.
- Select the Maximizer fields, including user-defined fields, you want to appear on the form. Information entered in the form's Last Name field, for example, is inserted into the Last Name field when importing information into Maximizer. If you have chosen a table user-defined field, a drop-down list is automatically created so customers can select available choices.
- Change displayed field names. For example, if you want to include in the form an existing Maximizer user-defined field called "GIC Heard About", you can choose to display a helpful label such as "How did you hear about our GIC program?".
- Designate mandatory fields, in addition to the last name and email address fields. If information is not entered in these mandatory fields, the customer will be notified via a Failure page.
- Create rules to manage when collected information is sent to the website administrator (or whatever other email addresses you specify).
- Use HTML to customize the look of the areas above and below the web form; the look of the form itself cannot be customized.
- Use HTML to customize the Success page and the areas above and below the Failure page.
- Preview the web form and return to the respective wizard screens to make the required adjustments.

➤ **To open the Web Inquiry Form wizard**

- On the **Tools** tab, select **Web Form** from the **Internet** group.


Welcome to the Web Inquiry Form Wizard
Maximizer Wizard
Web Inquiry
This wizard will take you through the process of creating a web form to collect your customers' information. The collected information will be emailed to the site administrator to be directly imported into Maximizer.
NOTE: To use this feature, you must have access to a web server with HTML file reading and CGI execution permissions. Consult your Internet Service Provider (ISP) or system administrator for more information on the hosting of these files.
Form templates
The web form settings can be saved into a form template for future editing. You may create a web form based on an existing form template.
Load selected form template
Create new form template
Maximizer
< Back
Next >
Cancel

Requirements for Web Inquiry Forms

If you are creating forms using the Web Inquiry Form wizard in Maximizer, you must consider some mandatory circumstances regarding your Internet Service Provider (ISP). First, your ISP must support HTML file readings and CGI execute permissions. Second, if your ISP is running a UNIX server, you must ensure the ISP installs the following Perl modules:

- CGI
- Net::SMTP
- MIME::Base64

Third, you may have to ask your ISP to install the "winqcgi.pl" file into a folder that has execute permissions.

You may also have to modify the generated web form HTML page to target the winqcgi.pl file installed by the ISP. To do so, modify the following line:

<FORM action="winqcgi.pl" method="post" name="mtiform">

to

<FORM action="/cgi-bin/winqcgi.pl" method="post" name="mtiform">

Creating Direct Insert Web Forms

You can set up your web forms so that they insert new entries directly into a Maximizer Address Book. In order to create direct insert forms, Maximizer must be installed on the web server that is hosting your web form. Before creating the direct insert web form, you must first set up a virtual directory. If your web server runs Windows Server 2003, you also need to add a web service extension for the web form.

➤ To create a direct insert web form

1. Create a folder for the web form.
2. On the **Tools** tab, select **Web Form** from the **Internet** group.

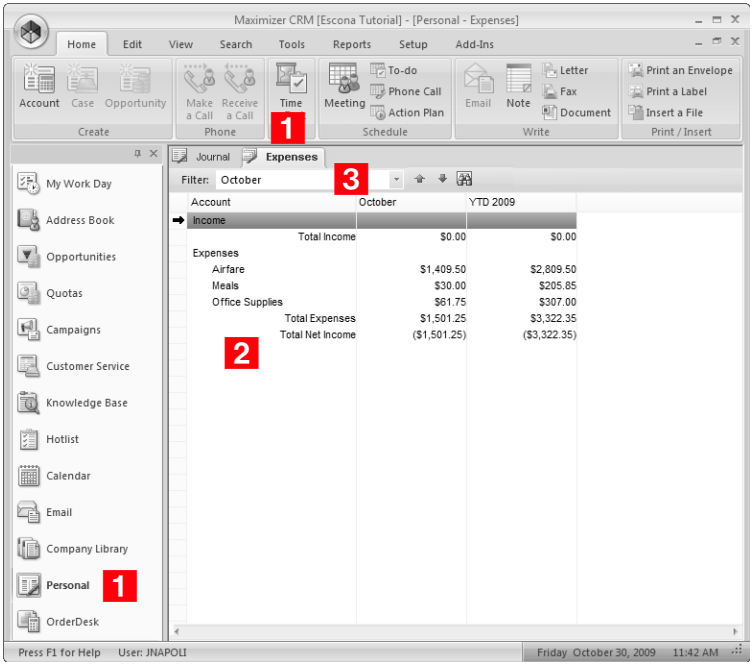
   The Web Inquiry Form Wizard opens.
3. Follow the instructions in the Web Inquiry Form Wizard.
   - On the **Server and File Options** screen, select the **Direct Insert** option.
4. Copy the form's .html files and the winqcgi.exe (for Windows servers) or winqcgi.pl (for Unix servers) file to the folder.
5. Launch IIS and create a virtual directory pointing to the folder.

   For more information on IIS and virtual directories, see the *Maximizer CRM Administrator's Guide*.

Income and Expenses

Use the Expenses window to record your income and expense items in separate accounts. Keep the following points in mind when working in the Expenses window.

1. Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
2. Income and expenses are split up into accounts. The account totals are displayed for the current month and the current year.
3. Use the **Filter** drop-down list and the **Previous Month** and **Next Month** buttons to change the month for which income and expenses are displayed.



The following sections contain information on keeping track of income and expenses in Maximizer:

- "Adding Income and Expense Accounts" on page 336
- "Recording Income and Expenses" on page 337

Adding Income and Expense Accounts

Income and expenses are stored in accounts. Before recording income or expense items, you must set up the accounts. You can share accounts with other Maximizer users or keep them private.

➤ To add an account

1. Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
2. On the **Home** tab, select **Account** from the **Create** group.

   – or –

   Right-click and select **Add Account**.

   The New Income/Expense Account dialog box opens.

3. In the **Account** area, enter a name and a description for the account.

   The description is the text that identifies the account in the Expenses window. The name is required but not displayed in the Expenses window.
4. In the **Type** area, select the type of account—**Expense** or **Income**.
5. In the **Security** area, select **Public** to share the account with other Maximizer users or **Private** to keep the account private.
6. Click **OK** to finish adding the account.

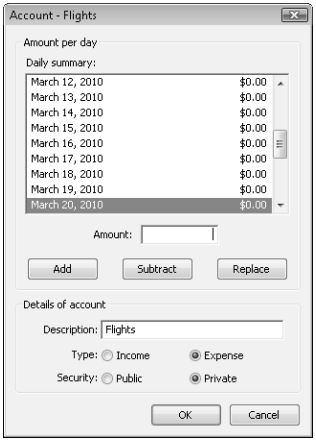
Recording Income and Expenses

Once you have set up your income and expense accounts, you can record income and expenses for specific days.

➤ To record an income or expense amount

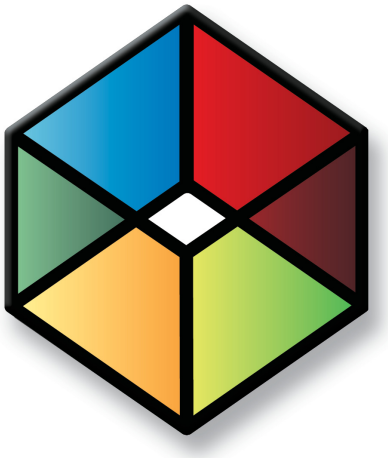
1. Select the **Personal** icon, and select the **Expenses** tab to open the Expenses window.
2. If necessary, select a month for the expense/income.
   - From the **Filter** drop-down list, select a month in the current year.
   - Click the **Select Month and Year** icon and specify any year and month.
3. Double-click on the account to open it.

   The Account dialog box opens displaying details of the account.



4. In the **Daily summary** list, select the day for the income/expense amount.
5. In the **Amount** field, enter the amount for the income/expense, and click **Add**.

   You can enter multiple amounts to add them all to the selected day.
6. Click **OK** to save the change to the account.



CHAPTER 14

Reporting

Report on the Progress of Your Business

In this chapter...

"Dashboards" on page 340
"Crystal Reports" on page 354
"Printing Reports from Maximizer" on page 358
"Exporting Entries to Microsoft Excel" on page 360
"Graphing and Charting" on page 361

Dashboards

Designed for executives and upper management, dashboards shows up-to-the-second indicators of your company's performance. Like a car's dashboard, dashboard indicators monitor daily activities and events in real time, so you can see which areas are doing well and which areas need attention.

With this type of information on your screen at all times, you can see in a glance how your company is doing and even see the indicators register activity from moment to moment.

For important indicators, such as daily lost or won opportunities, you can configure Dashboard to notify you with an alarm when the indicator passes a certain mark. This helps to notify you when a critical situation has occurred that requires your attention, or when you surpass a goal that you set for your team.

The following sections contain information on working with dashboards:

- "Viewing Dashboard" on page 340
- "Setting Up Dashboards" on page 341
- "Creating Dashboards" on page 342
- "About Indicators" on page 343
- "Adding Indicators to Dashboards" on page 346
- "Customizing Indicator Controls" on page 350
- "Moving and Resizing Dashboard Indicators" on page 351
- "Modifying Dashboard Properties" on page 352
- "Importing Dashboards" on page 352

Viewing Dashboard

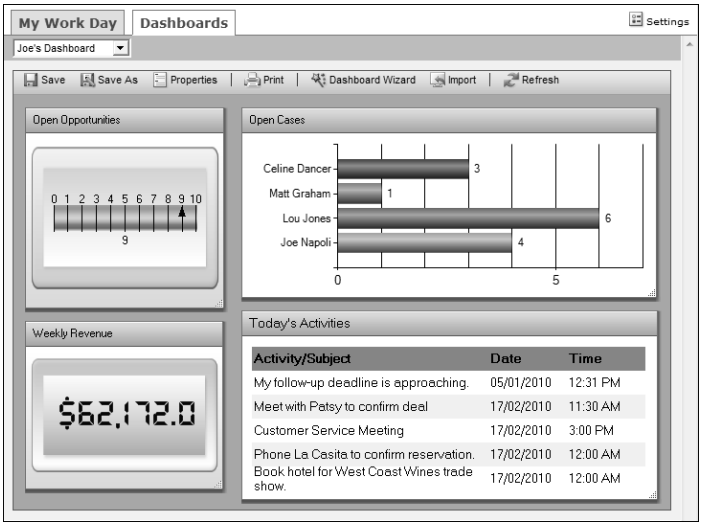
You can view dashboards from the Dashboards tab in the My Work Day window. If the dashboard you want to view is not displayed, select it from the drop-down list. Note that you must have read permission for Dashboards to access the Dashboards tab.

If the Dashboards tab is not displayed, click Settings and ensure the Show Dashboards checkbox is selected.

➤ To view a dashboard

1. Select the **My Work Day** icon, and select the **Dashboards** tab.
2. From the drop-down list, select the dashboard you want to view.

The selected dashboard is displayed in the My Work Day window.



Setting Up Dashboards

Setting up a new dashboard involves the following tasks:

1. Set up searches or SQL metrics for your dashboard indicators.

   For more information, see “About Indicators” on page 343.

2. Create the dashboard using the Dashboard Wizard.

   For more information, see “Creating Dashboards” on page 342.

3. Add indicators to the dashboard.

   For more information, see “Adding Indicators to Dashboards” on page 346.

4. Customize the appearance of the dashboard indicators.

   For more information, see “Customizing Indicator Controls” on page 350.

5. Resize and move the dashboard indicators.

   For more information, see “Moving and Resizing Dashboard Indicators” on page 351.

Creating Dashboards

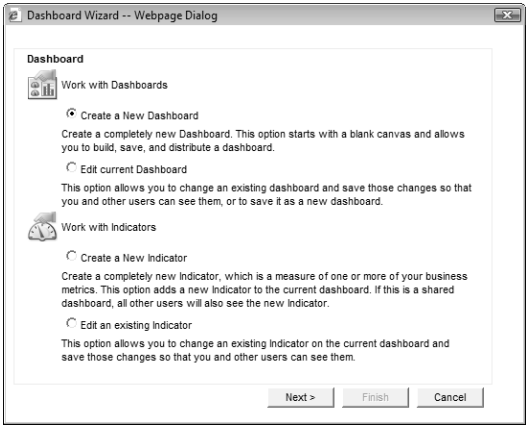
You can create new dashboards from the Dashboards tab of the My Work Day window. While creating the dashboard, you can add multiple indicators to the dashboard. The new dashboard is available to any user or group that you give read access to. When you create a dashboard, you have the option of publishing it to Wireless Access.

➤ To create a dashboard

1. In the Dashboards tab of the My Work Day window, select the **Dashboard Wizard** icon.

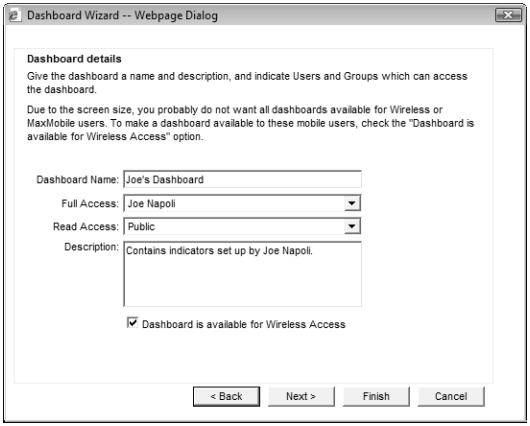
   The Dashboard Wizard opens.

2. Select **Create a New Dashboard** selected, and click **Next**.


Dashboard Wizard -- Webpage Dialog
Dashboard
Work with Dashboards
Create a New Dashboard
Create a completely new Dashboard. This option starts with a blank canvas and allows you to build, save, and distribute a dashboard.
Edit current Dashboard
This option allows you to change an existing dashboard and save those changes so that you and other users can see them, or to save it as a new dashboard.
Work with Indicators
Create a New Indicator
Create a completely new Indicator, which is a measure of one or more of your business metrics. This option adds a new Indicator to the current dashboard. If this is a shared dashboard, all other users will also see the new Indicator.
Edit an existing Indicator
This option allows you to change an existing Indicator on the current dashboard and save those changes so that you and other users can see them.
Next >
Finish
Cancel

3. Enter the basic information for the dashboard.
   - In the **Dashboard Name** field, specify a name for the dashboard.
   - In the **Full Access** and **Read Access** fields, specify the Maximizer user or group with access to the dashboard.
   - Select **Dashboard is available in Wireless Access** to make the dashboard available to Wireless Access users.

     If you don't select this option, the dashboard is available only in Maximizer and in Maximizer Web Access. You might want to clear this option if the dashboard is not set up to display well on smaller screens.


Dashboard Wizard -- Webpage Dialog
Dashboard details
Give the dashboard a name and description, and indicate Users and Groups which can access the dashboard.
Due to the screen size, you probably do not want all dashboards available for Wireless or MaxMobile users. To make a dashboard available to these mobile users, check the "Dashboard is available for Wireless Access" option.
Dashboard Name: Joe's Dashboard
Full Access: Joe Napoli
Read Access: Public
Description: Contains indicators set up by Joe Napoli.
Dashboard is available for Wireless Access
< Back
Next >
Finish
Cancel

4 Click **Next**.

The Indicators screen opens.

5 Add an indicator to the dashboard.

For more information on adding indicators, see "Adding Indicators to Dashboards" on page 346.

6 When you are finished adding indicators, click **Finish** in the Dashboard Wizard to finish creating the dashboard and to view it in My Work Day.

About Indicators

Indicators display the information in your dashboards. Each dashboard can contain multiple indicators.

You can set up indicators to access information in your Address Books in the following ways:

- **Searches –** You can link indicators with existing searches in the search catalog. The indicator reports either the number of entries returned in the search or a calculation based on fields in the entries.
- **SQL metrics –** Your administrator can set up SQL queries that report on any information in your Address Book. While they are defined in Administrator, you can add any of these metrics to your dashboard indicators in Maximizer.

You can choose from a number of indicator controls to display the data. These controls format your Address Book data in charts, lists, and gauges.

While setting up your indicators, you can set up Click Throughs for the indicators. Click Throughs determine what happens when a Maximizer user clicks on an indicator.

Searches for Indicators

You can use the Search by All Fields command to set up searches in the Address Book, Opportunities, Customer Service, and Campaigns windows and then save the searches to the search catalog. When you create indicators, you can select any of these saved searches to access data for the indicator. You can also report on quotas, appointments, and Hotlist tasks in your indicators. While you cannot save searches for these types of entries, you can set up some search criteria while creating the indicator.

While setting up the search criteria, you can specify generic values in your searches to make them reusable for different users and at different times. For fields that take Maximizer users as values, you can specify the current user as the value of the field. For date fields, you can specify values in relation to the current date, such as today, next month, and current fiscal quarter. Each time the search is run, values for the current user and values relative to the current date are retrieved.

SQL Metrics for Indicators

Your administrator can define any number of SQL metrics for dashboard indicators. You can specify any of these metrics when you create new indicators. When you create group indicators, you can define a number of SQL metrics for each indicator. For more information on setting up SQL metrics, see the *Maximizer CRM Administrator's Guide*.

Reporting on Data for Indicators

After setting up your search from the search catalog, you can decide how to report on the search. The indicator can report on the entries in the following ways:

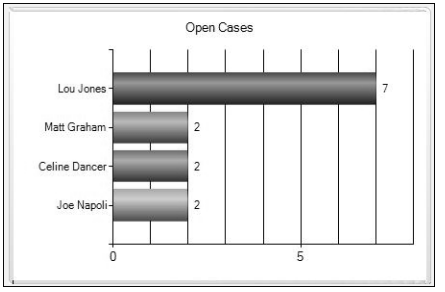
- **Average –** The indicator displays the average value of a selected numeric field for all entries returned in the search.
- **Minimum –** The indicator displays the minimum value of a selected numeric field for all entries returned in the search.
- **Maximum –** The indicator displays the maximum value of a selected numeric fields for all entries returned in the search.
- **Range –** The indicator displays the difference between the maximum and minimum values of a selected numeric field for all entries returned in the search.
- **Record count –** The indicator displays the number of entries returned in the search.
- **Sum –** The indicator displays the sum of a selected numeric field for all entries returned in the search.

Indicator Controls

When you set up your indicators, you can choose from a number of controls in which to display your indicator. The controls determine how information is displayed in the indicator.

You can select the following types of controls:

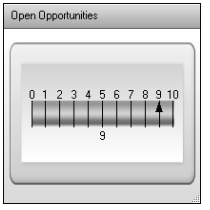
- **Group indicators –** These controls display a number of values formatted as bar charts or pie charts.



- **List Control –** These controls format information in lists. They can report information directly from Maximizer records, or they can summarize information based on values from multiple entries.

Today's Activities
Activity/Subject Date Time
Meeting 24/11/2009 3:30 PM
Customer Service Meeting 24/11/2009 2:00 PM
Phone representative about new deal. 24/11/2009 11:00 AM
Book hotel for Santa Rosa trade show. 24/11/2009
Phone to confirm reservation. 24/11/2009 11:00 AM

- **Gauges –** These controls display a single numeric value for an indicator.



Click Throughs for Indicators

While setting up indicators, you can specify a Click Through for the indicator. Click Throughs link indicators to Maximizer records, reports, or other dashboards.

When you set up your Click Throughs, you can choose the following options:

- **No Click Through –** The dashboard indicator is not linked with any other information.
- **Use the existing Click Through –** The indicator is linked to an existing Click Through. You can select this option when you add indicators associated with SQL metrics or when you modify existing indicators. Your system administrator can link SQL metrics with reports in Administrator.
- **Produce a list in Maximizer CRM to work with –** The Address Book, Opportunities, Campaigns, Customer Service, Quotas, or Hotlist window opens displaying entries retrieved from the search associated with the indicator.
- **Run a report –** Reporter opens displaying a specified report. You must enter the URL of the report while setting up the indicator.
- **Open another dashboard –** A dashboard is displayed. You must specify the dashboard while setting up the indicator.

Adding Indicators to Dashboards

You can add indicators while creating dashboards, or you can add them to existing dashboards in the Dashboards tab of the My Work Day window.

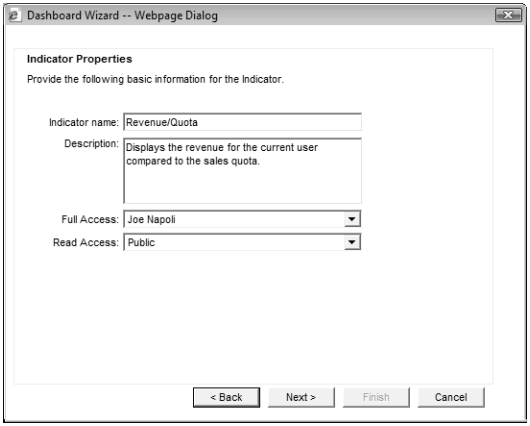
➤ To add an indicator to a dashboard

1. If necessary, select the dashboard from the drop-down list, and select the **Dashboard Wizard** icon. Then, select **Create a New Indicator**, and click **Next**.

   The Indicator Properties screen opens.

   If you are adding the indicator while creating a new dashboard, you should already be at the Indicator Properties screen.

2. Enter the basic information for the indicator, and click **Next**.
   - In the **Indicator name** field, specify a name for the indicator.
   - In the **Full Access** and **Read Access** fields, specify the Maximizer user or group with access to the indicator.



3 Select a control for the indicator, and click **Next**.

For more information on controls, see "Indicator Controls" on page 345.

The What to Report screen opens.

4 Select the catalog search or SQL metric to associate with the indicator, and click **Next**.

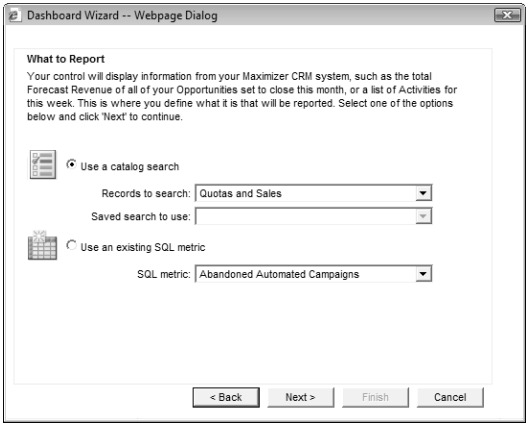
- To associate the indicator with a catalog search, select **Use a catalog search**. In the **Records to search** drop-down list, select the type of entry associated with the search. In the **Saved search to use** drop-down list, select the search from the search catalog.

  For more information on associating indicators with saved searches, see "Searches for Indicators" on page 344.

- To associate the indicator with information from activities (appointments and Hotlist tasks) or quotas, select **Use a catalog search**. In the **Records to search** drop-down list, select **Activities** or **Quotas and Sales**.

- To associate the indicator with a SQL metric, select **Use an existing SQL metric**. In the **SQL metric** drop-down list, select the metric.

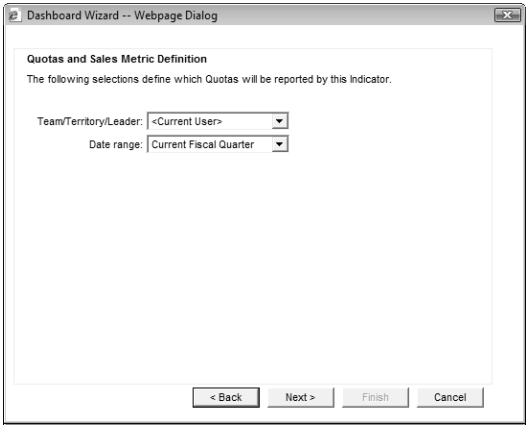
  For more information on SQL metrics, see "SQL Metrics for Indicators" on page 344.


Dashboard Wizard -- Webpage Dialog
What to Report
Your control will display information from your Maximizer CRM system, such as the total Forecast Revenue of all of your Opportunities set to close this month, or a list of Activities for this week. This is where you define what it is that will be reported. Select one of the options below and click 'Next' to continue.
Use a catalog search
Records to search: Quotas and Sales
Saved search to use:
Use an existing SQL metric
SQL metric: Abandoned Automated Campaigns
< Back
Next >
Finish
Cancel

5 If you are associating the indicator with activities or quotas, specify how to filter the information, and click **Next**.

If the indicator is associated with activities, you can filter the activities by type (appointment or Hotlist task), user, date, and other fields specified in the activity.

If the indicator is associated with quotas, you can filter the quotas by team, territory, or leader and by date range.


Dashboard Wizard -- Webpage Dialog
Quotas and Sales Metric Definition
The following selections define which Quotas will be reported by this Indicator.
Team/Territory/Leader: <Current User>
Date range: Current Fiscal Quarter
< Back
Next >
Finish
Cancel

6 If you are creating a list control, specify the type of information to return.

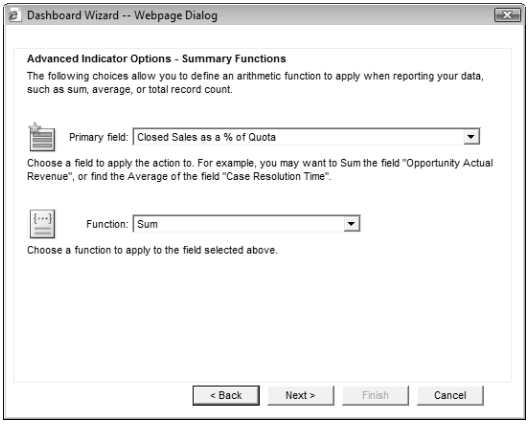
- To view information directly from entries, select **Report directly fields from your saved search results**.
- To view summary information based on the values of multiple entries, select **Top N records based on summarized data**.

7 If you are associating the indicator with a search, with activities, or with quotas, specify how to report the data, and click **Next**.

- In the **Primary field** field, select the numeric field that you want to manipulate.
- In the **Function** field, select the function to use on the field.

  If you select Record count, you don't need to specify a primary field.

  For more information on these options, see "Reporting on Data for Indicators" on page 344.


Dashboard Wizard -- Webpage Dialog
Advanced Indicator Options - Summary Functions
The following choices allow you to define an arithmetic function to apply when reporting your data, such as sum, average, or total record count.
Primary field:
Closed Sales as a % of Quota
Choose a field to apply the action to. For example, you may want to Sum the field "Opportunity Actual Revenue", or find the Average of the field "Case Resolution Time".
Function:
Sum
Choose a function to apply to the field selected above.
< Back
Next >
Finish
Cancel

If you are creating a list control that returns information directly from entries, this screen does not appear.

8 If you are creating a group indicator or a list control with summary information, in the **Group by** field, select the field by which you want to organize the data, and click **Next**.

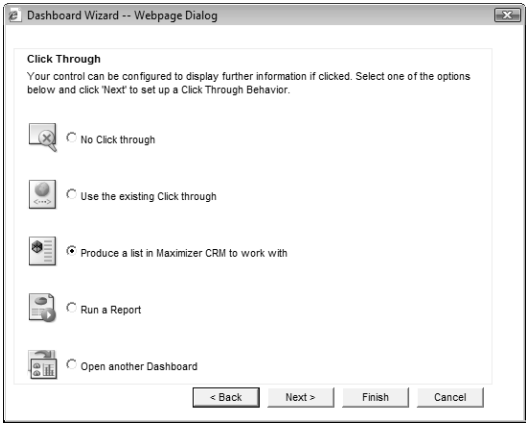
For example, to display data for each Maximizer user, you can select a field that displays a user name.

9 If you are creating a group indicator or a list control, specify the fields to display in the list (list control only), and specify how you want to sort the indicator, and click **Next**.

- In the **Sort By** field, select the field by which you want to sort the values. You can sort entries by the values of the primary field or by the field that is splitting up the data.
- In the **Sort order** field, select **Ascending** or **Descending** to determine in which order the values are sorted.

10 Specify the Click Through for the indicator, and click **Next**.

For more information on Click Throughs, see "Click Throughs for Indicators" on page 346.


Dashboard Wizard -- Webpage Dialog
Click Through
Your control can be configured to display further information if clicked. Select one of the options below and click 'Next' to set up a Click Through Behavior.
No Click through
Use the existing Click through
Produce a list in Maximizer CRM to work with
Run a Report
Open another Dashboard
< Back
Next >
Finish
Cancel

If the Click Through runs a report or launches another dashboard, specify the report or dashboard for the click through, and click **Next**.

11 Click **Finish** to finish adding the indicator to the dashboard.

– or –

Select **Work with a different indicator** and click **Next** to add more indicators to the dashboard.

Customizing Indicator Controls

After adding indicators to dashboards, you can customize some of the properties of the indicator controls. For all controls, you can change the basic information, the SQL metrics associated with the controls, and the colors of elements in the controls. For gauge controls, you can change the style of the control and specify alarm levels. For list controls, you can change the formatting of the list.

While customizing the indicator controls, you can launch the Dashboard Wizard to modify some of the other properties of the indicator.

➤ To customize a dashboard indicator

1 In the Dashboards tab of the My Work Day window, select the dashboard containing the indicator from the drop-down list.

2 Right-click on the indicator that you want to customize.

The Properties dialog box opens.

3 In each tab of the dialog box, specify settings for the indicator.

- In the **Details** tab, specify the name, description, and access rights for the indicator.

- In the **Indicator Type** tab (gauge controls only), select the gauge type, scale, and style.
- In the **Alarm/Target Settings** tab (gauge controls only), enable an alarm for the indicator, and specify the alarm level.
- In the **Color Settings** tab (gauge controls only), specify the colors of elements in the indicator.
- In the **Gauge Settings** tab (list controls or gauge controls only), specify that gauges display currency symbols, or specify the field, width, and alignment for each field in a list control.

List controls cannot display currency symbols.

- In the **Metrics** tab, view the name of the metric associated with the indicator.

  If the indicator uses a SQL metric, you can select a different metric in this tab. If the indicator uses a search, you must specify the search criteria in the Dashboard Wizard.
- In the **Display Settings** tab (list controls) or **Settings** tab (group controls), specify the colors, font size, and font style for elements of the control.

  For group indicators, you can also specify the intervals for the charts and specify that the indicators display currency symbols.

In group indicators, currency symbols are displayed in the legend.

4. To modify the properties of the indicators, click **Wizard** to open the Dashboard wizard at the Indicator Properties screen.
5. When you are finished, click **OK**.
6. Click the **Save** icon to save the changes to the dashboard.

Moving and Resizing Dashboard Indicators

When you add an indicator to a dashboard, it's added at the bottom of the dashboard. But you can drag and drop the indicator to move it to any location in the dashboard. When you press Save, the location is saved with the dashboard.

You can also resize dashboard indicators. Click the bottom-right corner of the indicator and drag it to the desired size.

Modifying Dashboard Properties

You can quickly modify the properties of dashboards. You can change the basic information for the dashboard, change the background color, and add or remove indicators from the dashboard.

➤ To modify dashboard properties

1. In the Dashboards tab of the My Work Day window, select the dashboard from the drop-down list.
2. Click the **Properties** icon.

   The Dashboard Properties dialog box opens.
3. In the **General** tab, specify the basic properties of the dashboard.

   To change the background color, click the button next to the **Background Color** field, and select a color.
4. In the **Indicators** tab, view the indicators in the dashboard.
   - Select an indicator and click **Properties** to modify the properties of an indicator.
   - Select an indicator and click **Remove** to remove an indicator from the dashboard.
   - Click **Add** to open the Dashboard Wizard and add an indicator to the dashboard.
5. When you are finished, click **OK**.
6. Click the **Save** icon to save the changes to the dashboard.

Importing Dashboards

Dashboards created in previous versions of Maximizer are stored locally on users' computers in .KIN files. You can import these files into Maximizer to store the dashboards in the Maximizer Address Book so that they are accessible to other Maximizer users on any computer. You must import the .KIN files into the same Address Book they were initially created in.

The location of the .KIN files depends on your computer's operating system. You can search your hard drive for the .KIN file extension to locate the files.

➤ To import a dashboard created in a previous version of Maximizer

1. On the Dashboards tab of the My Work Day window, click the **Import** icon.

   The Import File dialog box opens.

2. Click **Browse**, browse to the .KIN file, and click **Open**.

3. Click **OK** to import the .KIN file.

   Once the .KIN file is converted to a new dashboard, it's displayed in the My Work Day window.

4. Click the **Save As** icon to save the new dashboard.

5. Enter a name for the dashboard, and click **OK**.

Crystal Reports

The Crystal Reports viewer is installed automatically with Maximizer and is accessible from the Reports tab. To create or modify reports, you must have the full Crystal Reports program installed.

Crystal Reports supports up to 256 linked views when using Microsoft SQL.

Maximizer installs a set of standard Sales and Customer Service reports, but you can also create your own custom, shared reports and save them in the MaximizerReports folder (in My Documents) where they can be accessed from the Reports tab in Maximizer.

The following sections contain information on using Crystal Reports with Maximizer:

- "Launching Crystal Reports" on page 354
- "Creating and Accessing Corporate Reports" on page 354
- "Creating and Accessing Personal Reports" on page 356

Launching Crystal Reports

You can launch Crystal Reports from Maximizer. You can also open Crystal Reports outside of Maximizer from the Start menu.

In order to launch Crystal Reports from Maximizer, you must be part of the Crystal Report Users security group. See the *Maximizer CRM Administrator's Guide* for more information.

➤ **To launch Crystal Reports**

- On the **Reports** tab, select **Crystal Reports > Personal > Custom Report**.

Creating and Accessing Corporate Reports

The Maximizer installation provides a standard report set consisting of Sales, Marketing, and Customer Service reports. These reports provide out-of-the-box reporting.

The Maximizer CRM Server installation creates the...\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder, which contains shared reports. All folders and reports within this folder are accessible from the Crystal Report commands on the Reports tab in Maximizer.

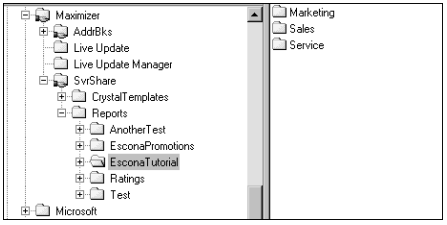
Before accessing reports in Maximizer you must create the reports using Crystal Reports.

➤ To access a corporate Crystal report from Maximizer

1. Save your Crystal Report in one of the following folders that are created by the Maximizer installation:
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Sales
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Marketing
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Service

   – or –

   To create your own reports folder, create a folder on the Maximizer server and copy the report to the folder in the following location: Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\



If you create your own folder, it appears as one of the submenu items under the Crystal Reports item.

If you are upgrading Maximizer from a previous version and you have old reports in the Crystal Reports file structure for Maximizer, the old reports will appear in an archived folder named after the Address Book with a .BAK file extension where your other report files for Maximizer are stored (for example, Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name>.BAK folder). You can copy the reports to any of your working folders to access the reports from Maximizer.

Note that for MaxExchange remotes, these reports are installed in the following folder: Documents and Settings\All Users\Application Data\MaximizerGlobalReports

2. On the **Reports** tab, select **Crystal Report > Refresh**.

   If you created a folder, it is displayed as one of the available report types and your report is available in the folder where you saved the report.

3 To access the report, on the **Reports** tab, select **Crystal Report**, and select the report from the folder.

For example, select Sales, and then select the report name.

Creating and Accessing Personal Reports

Maximizer installations create the local folder ...\My Documents\MaximizerReports. This local folder is the default location for your personal report templates.You can create new report templates, edit existing report templates, and view reports using existing report templates directly from Maximizer.

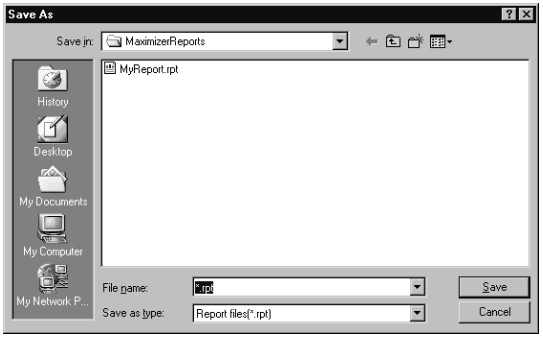
➤ To create and access a personal Crystal Report from Maximizer

1 On the Reports tab, select **Crystal Report > Personal > Custom Report** to launch Crystal Reports and create the report.

In order to launch Crystal Reports from Maximizer, you must be part of the Crystal Report Users security group. See the *Maximizer CRM Administrator's Guide* for more information.

2 When you are prompted, enter a report name.

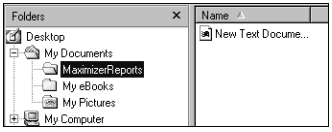
By default, the report is saved in ...\My Documents\MaximizerReports.



3 Create the report in Crystal Reports and save the report file in the MaximizerReports folder on your local drive.

If you are prompted with a login screen, enter your Maximizer user name and password.

4 In Maximizer, on the **Reports** tab, select **Crystal Report > Refresh**.

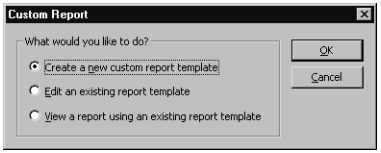


5 To access the report, on the **Reports** tab, select **Crystal Report > Personal**, and select the name of the report.

– or –

On the Reports tab, select **Crystal Report > Personal > Custom Report**, and select the **View a report using an existing report template**.

If you would like to edit the report template, choose **Edit an existing report template**.


Custom Report
What would you like to do?
Create a new custom report template
Edit an existing report template
View a report using an existing report template
OK
Cancel

Printing Reports from Maximizer

Column reports are a fast way to print Maximizer information as it appears in your current list, while a Detailed report lets you print more detailed information. Other reports, such as the Notes, and Name/Address/Telephone reports, allow you to print specific information about your Address Book entries, opportunities, campaigns, and customer service cases.

You can print your calendar appointments as a Calendar Book or Appointment Calendar. You can print a Personal Organizer from the Address Book, Contacts, Related Entries or Hotlist window.

You can print reports from the Reports tab or from the Print group in the Home tab. The Reports tab gives you access to every type of Maximizer report, irrespective of the window that is open. For example, if you are in the Address Book window, and want to print an opportunity report, on the Reports tab, select Opportunities > [type of report]. The Opportunities window automatically opens and the report extracts information from the current opportunities list. The Print group on the Home tab prints reports strictly related to the window that is currently open.

While all Maximizer reports can be sent to a printer, you can additionally generate .RTF (Rich Text Format), .PDF files (Portable Document Format) for most reports in Maximizer. You can also preview most Maximizer reports.

The Reports tab allows you to print reports on the following Maximizer information:

- Address Book entries
- Sales leads
- Contacts
- User-defined fields
- Notes
- Opportunities
- Quotas
- Campaigns
- Customer service cases
- Documents
- Hotlist
- Calendar
- Knowledge base articles
- OrderDesk
- Journal entries

- Expenses
- Related entries
- Activities
- Phone log

Types of Reports

You can create the following types of reports in Maximizer:

- **Column Report –** Displays the same information you see displayed in a controlling window, such as names and addresses or opportunity information.
- **Detailed Report –** Includes mailing address information, appointments, Hotlist tasks, user-defined fields, Contacts, document summaries, and notes for an Address Book entry or opportunity. A detailed report for a customer service case includes mailing address information, user-defined fields, Contacts, document summaries and notes.
- **User-Defined Field Report –** Lists the user-defined fields attached to each of your Address Book entries.
- **Executive Report –** Generates a highly detailed HTML-based report on all of your opportunities.

The Opportunities Executive Report generates many HTML files for its web browser interface. Save this report to a separate folder to keep your files organized.

- **Forecast Analysis –** Provides a summary of the probability of a successful close, the potential sales revenue, and the weighted amount associated with each active opportunity in the opportunity file.
- **Sales Alert Report –** Provides a summary of the opportunities that are behind schedule.
- **Analysis Reports-Detail –** Lists the opportunities by status with a revenue total.
- **Analysis Reports-Summary –** Reports the number of opportunities by status with total revenue.
- **Activities –** Lists the notes, Hotlist tasks, and appointments created or completed by Maximizer users in a specific date range.

Exporting Entries to Microsoft Excel

Maximizer enables you to quickly and easily export selected entries from a Maximizer window to a Microsoft Excel spreadsheet. Maximizer exports the currently selected entries for the active controlling or following window using the column setup and coloring rule displayed in that window. If no entries are selected, it exports all displayed entries.

To be able to export entries to Microsoft Excel, you must have the "Allow export" privilege and Excel must be installed on the current computer.

If the column setup includes multiple fields in a single column, each field is displayed in a separate column in Excel, with each column named after the Maximizer field name. For example, if the column setup includes a column named "Details", which contains the fields "Contact Name", "Next Action", and "Last Modified Date", the Excel spreadsheet would contain three columns named "Contact Name", "Next Action", and "Last Modified Date".

If the column setup includes a table user-defined field, multiple table items are combined into a single cell in Excel. For example, if the column setup includes a column for the "Partner Interests" table user-defined field, and the "General Information", "Press Releases", and "Technical Bulletins" table items are selected, the Excel spreadsheet would include a column named "Partner Interests" containing "General Information, Press Releases, Technical Bulletins" in a single cell.

If you use Excel 2007 or later, you have the option of performing an advanced export to Excel. This option lets you apply conditional formatting to numeric user-defined fields. You can choose the same data bars, color scales, and icon sets that are available in Excel. See the Excel documentation for more information on conditional formatting.

Note that reports exported to Excel are not dynamic, meaning they do not automatically update when changes to the exported entries are made. To update an exported report, repeat the export process.

➤ To export entries to Excel

1. Create a list of entries or select specific entries to export.
2. Select a column setup and apply a coloring rule to use for the export.
3. On the **Tools** tab, select **Export to Excel** or **Advanced Export to Excel** from the **Office** group.

4. If you are performing an Advanced Export to Excel, select the conditional formatting to apply to each column, and click **OK**.

   Only columns that display numeric user-defined fields are listed.

   To apply the conditional formatting to total cell, as well as the summed cells in the column, select **Include Totals**.

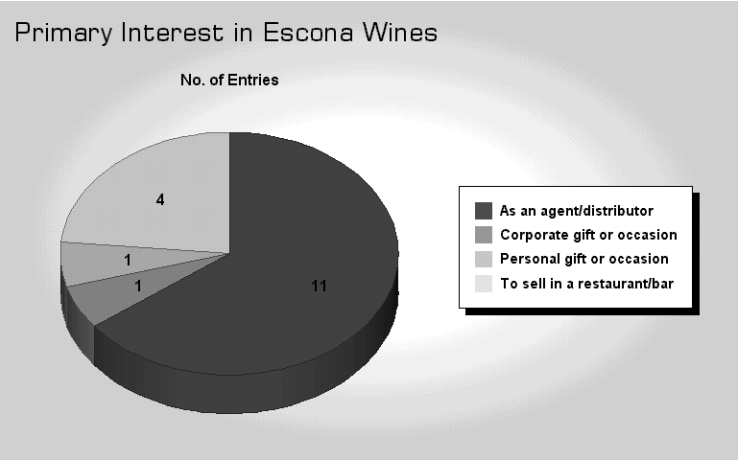
   Excel opens and displays the selected entries.

5. To keep the report, save it to your computer with a unique file name.

Graphing and Charting

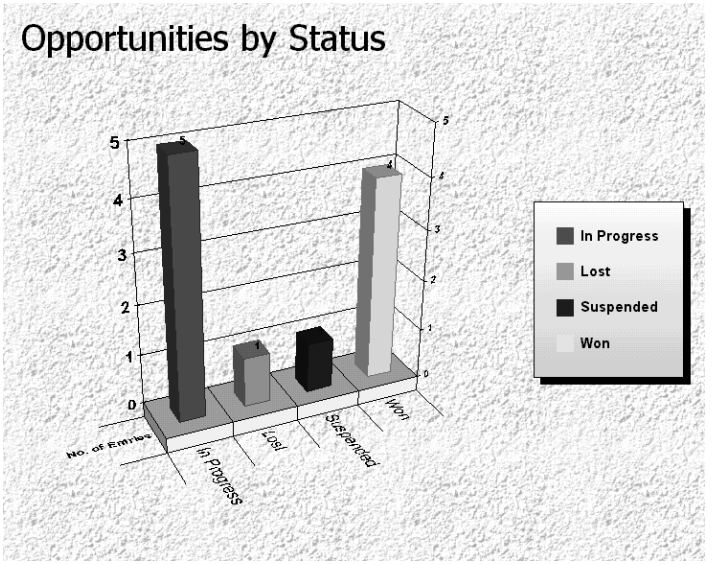
Creating a good presentation is about having good information and presenting it well. When you need to create attractive and meaningful graphs or charts for your presentation, and you need them quickly, Maximizer can do the job.

Maximizer gives you the ability to track your customers and find out who they are. Gathering relevant customer information is a key component of successful marketing and ecommerce initiatives. With the creation of meaningful graphs and charts on your Address Book data, you benefit from complete, detailed intelligence to evaluate the performance of your business.



When you graph your entries, you generate the graph using the entries listed in the Address Book or Opportunities window. For example, if your Address Book window currently lists all Address Book entries between A and M, only those entries will be graphed.

Once your list contains the entries you are trying to graph, choose the Graphing command from the Tools tab to begin the process of constructing your graph. You can graph any table or date field in your Address Book, such as City/Town, State/County/Province, Opportunity Status, to name only a few, and any table or date user-defined field.



Maximizer creates graphs and charts for all kinds of purposes. You can print your completed graph from Maximizer or save it as a high-quality image file that you can use in documents and presentations.

If you often create the same type of graph, you can save a graph template to a catalog, which you can retrieve at any time. You can even add a custom button to your Maximizer toolbar that instantly creates a graph from one of your saved templates.

The Chart wizard walks you through the steps of creating a graph or chart. You can then edit the final product to make it look attractive.

The following sections contain additional information on graphing and charting in Maximizer:

- "Creating Graphs" on page 363
- "Selecting Fields and Values for Your Graphs" on page 364
- "Defining the Appearance of Graphs" on page 366
- "Title and Footnote Merge Fields" on page 367
- "Customizing your Graphs" on page 368

- "Using Graphs in Other Applications" on page 369
- "Saving Graph Settings" on page 370

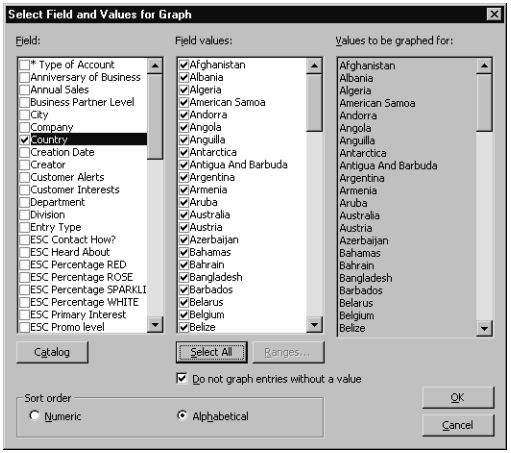
Creating Graphs

You can create graphs using information from your Address Book entries and opportunities.

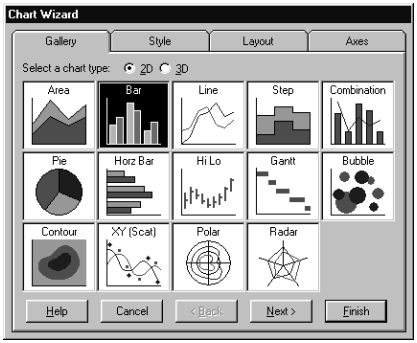
➤ To create a graph

1. In the Address Book or Opportunities window, create a entries to graph.
2. On the **Tools** tab, select **Graphing** from the **Other** group.
3. Choose the fields and values you are graphing.

   For example, you could graph Address Book entries by the City/Town or State/County/Province field. Defining the values lets you narrow the range or selection of values to graph.

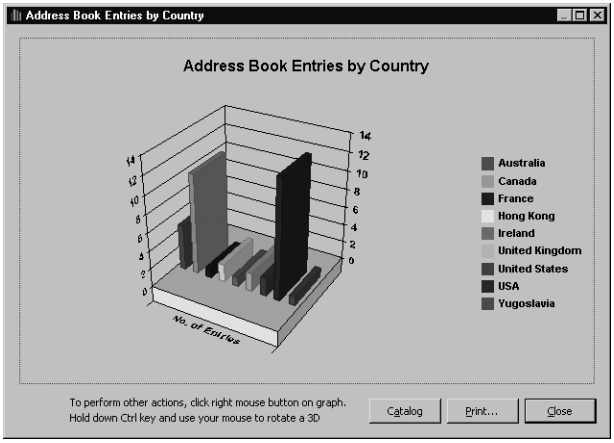


4. Use the Chart wizard to choose the graph type, style, and layout.



5 Edit your graph in the Graphing window.

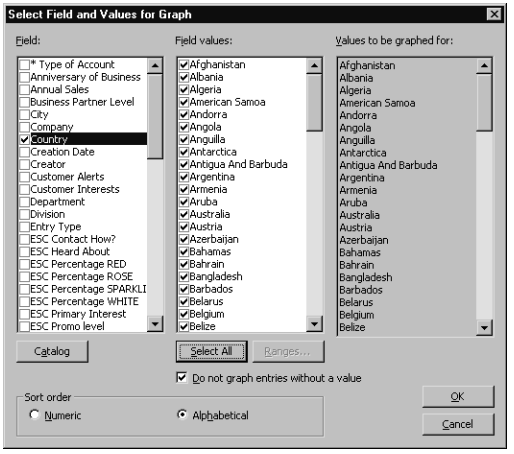
You can change the appearance of your graph and edit the data. From this window, you can also save your graph as an image file.



Selecting Fields and Values for Your Graphs

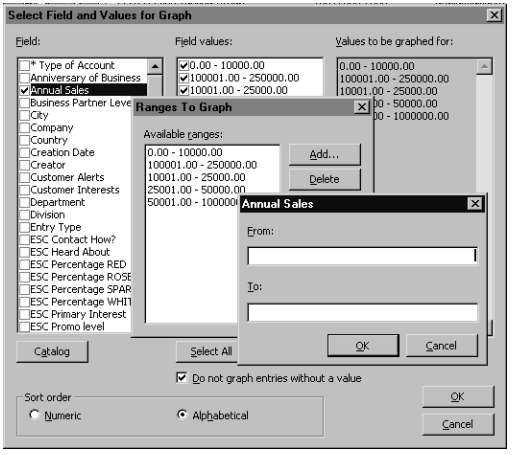
When you select the Graphing command, Maximizer prompts you to choose a field to graph. Your choice of fields depends on the type of entries you are graphing. If the Address Book window is active when you begin graphing, you choose from Address Book entry and user-defined fields, such as Company, City, or State. If the

Opportunities window is the active window, you choose from opportunity fields and user-defined fields, as in the Status, Team Leader, or Objective. You can graph any Address Book entry or opportunity field. Some field types require that you specify a range to graph, as in a range of amounts for "Annual Sales".



Maximizer lets you choose a range of values to graph for the field you select. For a table field, such as City/Town, you simply select the table items you want to include in the graph. Other field types—alphanumeric, numeric, or date fields—require you to enter a range.

For example, if you select "Anniversary of Business", you would have to provide the date ranges to include in the graph. This allows you to include only the area of interest.



Each range you provide becomes an item on the X-axis of your graph. If you defined your ranges for the "Anniversary of Business" user-defined field as January-June and July-December, you would have two columns in a bar graph (or two wedges in a pie graph).

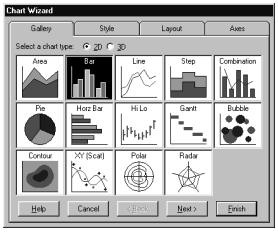
Finally, choose numeric or alphabetical as the sort order:

- **Numeric –** Displays charted values in numeric order, from lowest to highest. For example, if you choose a bar chart to graph the values of the City/Town field, the city/town (value) assigned to the least number of Address Book entries is shown on the left of the chart while the city/town assigned to the most number of entries is shown on the right. The legend will list the cities/towns in numeric order.
- **Alphabetical –** Displays charted values in alphabetical order, from A to Z. For example, if you choose a bar chart to graph the values of the City/Town field, any city (value) that starts with A is shown on the left of the chart while any city/town starting with Z is shown on the right of the chart. The legend will list the cities in alphabetical order.

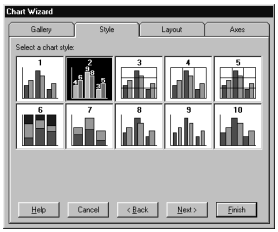
Defining the Appearance of Graphs

After you choose the field and values for your graph, the Chart wizard opens so you can define the characteristics of your graph. The Chart wizard has four tabs for defining your graph appearance:

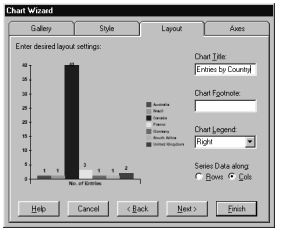
- **Gallery –** Choose flat (2D) or perspective (3D), and the chart type (Area, Bar, Pie, etc.).



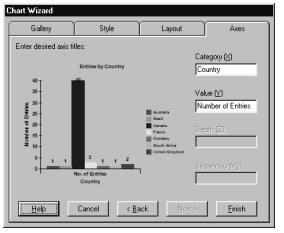
- **Style –** Choose the style based on the chart type you chose in the Gallery tab.



- **Layout –** Specify the title, footnote, and legend settings.



- **Axes –** Label your graph's axes.



These are only the basic characteristics of your graph—after the graph is generated, you can make additional changes to its appearance and even edit the graph data.

Title and Footnote Merge Fields

When you save a graph to the Graph Catalog, you can insert title (header) and footnote (footer) merge fields that display information such as the current date and time, the total number of entries, and other information.

For example, inserting "date" in the title of the graph and then saving the graph to the catalog as a template tells Maximizer to display the current day's date the next time you generate the graph.

The following fields are available for footers and headers:

- **[count] –** The total number of entries graphed.
- **[date] –** The date the graph is generated.
- **[login] –** The user ID of the logged-in user.
- **[time] –** The time the graph is generated.
- **[user] –** The name of the user specified in the Users dialog box in Maximizer.

➤ To insert a title or footnote merge field

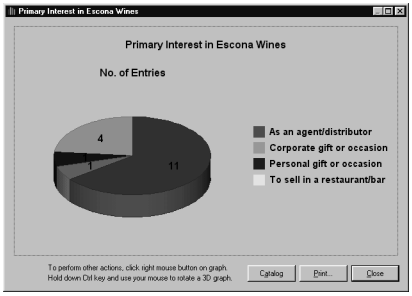
1. Start a new graph.
2. In the Chart wizard, select the **Layout** tab.
3. In the **Chart Title** and **Chart Footnote** fields, enter any fields you want to appear in the title and footnote of the graph.

   Remember to surround the field with square brackets, [like this].
4. Finish creating your graph and save it to the Graph Catalog.

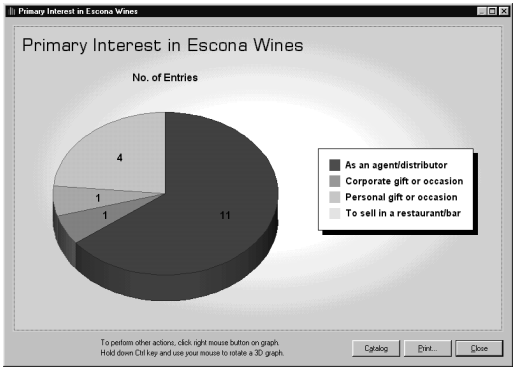
   The first time you create the graph, the field name will display, not the value (i.e., [user] instead of "Bob Smith"). The next time you generate the graph, the value will display correctly.

Customizing your Graphs

At first, your completed graph may not look like much—by default, it has a plain gray background and the graph's colors are chosen for you.

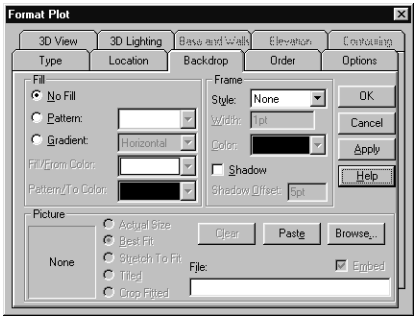


You can easily add your own touches to your graph by editing it in the Graphing window.



You can select and edit each element in the graph, such as the title, legend, or even the bars in a graph. The background, for example, can be a solid color of your choice, a gradient, or a "wallpaper" image. Simply select and double-click the element that you want to edit to display a setting dialog box. You can also right-click inside the graph to display a pop-up menu.

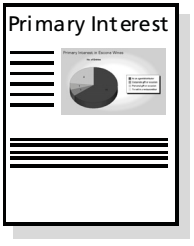
A background color can make a plain graph look attractive. To change the background properties, double-click within the area of the graph (but not on the graph itself) so that "selection handles" appear around the graph. The Format Plot dialog box lets you make many changes to your graph.

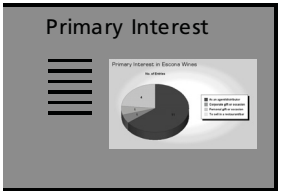


You can use this same procedure to change many of the graph elements. Try single-clicking different elements to see which ones show the selection handles. If selection handles appear, you can double-click it to edit the element.

Using Graphs in Other Applications

If you are making a presentation, you will probably want to use your graph in handouts or in an on-screen presentation. You can save your graph as an image file that you can use in other applications, such as word processors, spreadsheets, presentation software, and more.





When you save your graph, you have a choice of two image file types: Windows Metafile or Windows Bitmap. If you think you will have to resize the image when you insert it into your document or presentation, you might want to use the Windows Metafile format, as it is "scalable"—you can resize it without getting any jagged edges.

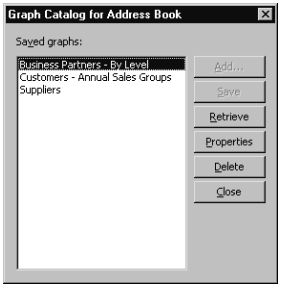
Saving Graph Settings

If you find yourself often creating the same type of graph, you can save yourself some time by saving the graph settings as a graph template in the Graph Catalog. After you generate the graph, use the Catalog button to save your graph template. Once your graph template is saved to the Graph Catalog, you can use the template when you next create a graph.

Graphs for Address Book entries and opportunities are stored in separate catalog. The available catalog depends on whether the Address Book or Opportunities window is selected.

➤ To add graph settings to the Graph Catalog

1. In the Graphing window, click the **Catalog** button to open the Graph Catalog.
2. Click **Add** to add your graph to the catalog.

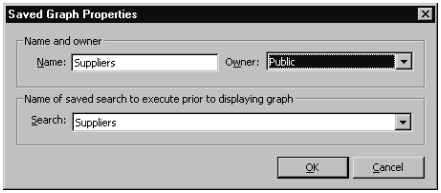


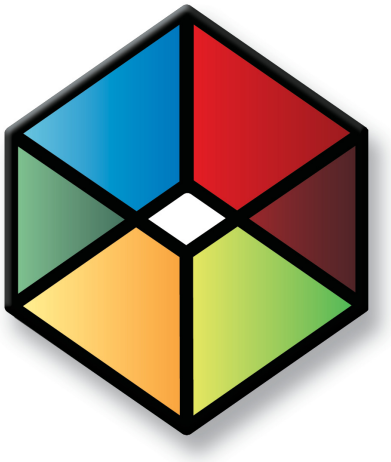
3. Type a descriptive name and specify a Maximizer user or group as the owner of the graph.

   To make the template available to all users, choose Public as the Owner.
4. If you have a search saved in the search catalog, select it in the search list to have Maximizer perform the search before generating the graph.

Ensure that access rights to the saved search are adequate. If users do not have read access to the search, they will not be able to generate the graph.

5 Click **OK** to save the graph settings to the Graph Catalog.





CHAPTER 15

OrderDesk

Keep track of customer orders

In this chapter...

"About OrderDesk" on page 374
"Sales Quotes" on page 375
"Item Table Merge Fields" on page 379
"Catalogs" on page 382
"Online Orders and Inquiries" on page 385

About OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter, process, and manage orders that come to you by telephone, mail, or other methods.

You can also use the OrderDesk window to do the following:

- Manage orders and inquiries from your online catalog site
- Enter orders or inquiries received from other sources
- Generate and manage sales quotes, which can later be converted to orders
- Preauthorize, authorize, and refund payments made against a consumer's credit card.
- Track inquiries, orders, shipping, and payment status.
- Calculate taxes and shipping costs automatically.
- Send email to customers or Maximizer users with summaries of orders and inquiries.
- Filter records to display only specific entries or entry type.

Enabling OrderDesk

OrderDesk is unavailable only if OrderDesk is enabled in your preferences. After enabling or disabling OrderDesk, you must restart Maximizer for the change to take affect.

➤ To enable OrderDesk

1. On the **Setup** tab, select **Preferences**.
2. Select **Enable OrderDesk** and click **OK**.

OrderDesk Window

The OrderDesk window displays all OrderDesk information in the Address Book. You can use the Address Book OrderDesk following window to view orders, inquiries, and sales quotes associated with the selected entry in the Address Book, Opportunities, or Customer Service window.

➤ To open the OrderDesk window

- In the icon bar, select the **OrderDesk** icon.

Sales Quotes

Sales quotes are a valuable sales tool. Use OrderDesk to easily generate and manage sales quotes. You can later convert your sales quotes to orders.

The following sections contain information on generating sales quotes:

- "Generating Sales Quotes" on page 375
- "Applying Discounts to Sales Quotes" on page 377
- "Adding Shipping and Tax to Sales Quotes" on page 378

Generating Sales Quotes

You can generate sales quotes for Address Book entries, opportunities, or customer service cases. To generate sales quotes, use the Quote dialog box. You can access this dialog box from either the OrderDesk or the Address Book OrderDesk window.

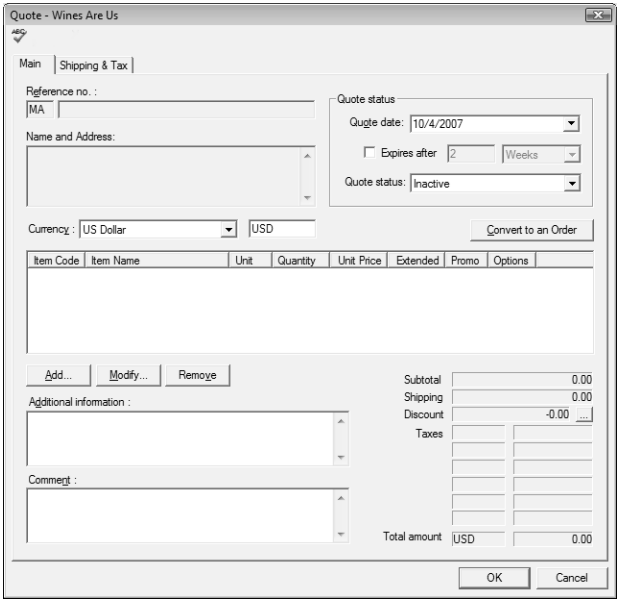
The Quote dialog box has two tabs:

- **Main tab –** Use this tab to set up the sales quote. You can add items to use in the quote, specify the currency, set the quote status, and apply discounts to items.
- **Shipping & Tax tab –** Use this tab to record shipping information such as the name and address, shipping charges, and applicable tax information.

➤ To set up a sales quote

1. Select the Address Book entry, opportunity, or customer service case for which you are generating the sales quote, and open the OrderDesk window or the Address Book OrderDesk following window.
2. On the **Edit** tab, select **OrderDesk > Add Quote**.

   The Quote dialog box opens.

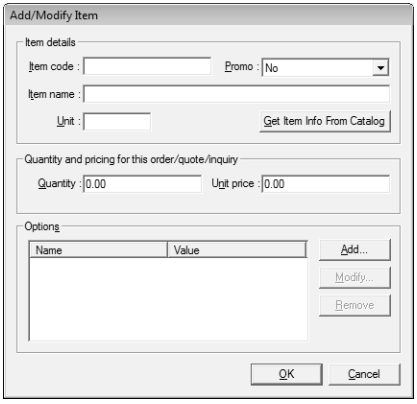


3 If required, adjust the currency.

4 Under **Quote status**, specify the date and the status of the quote.

5 Click **Add**.

The Add/Modify Item dialog box opens.



6 Fill in item details, or click **Get Info from Catalog** to get this information from an existing catalog.

- The **Item name**, **Quantity**, and **Unit price** fields are mandatory fields.

- Click **Add** in the **Options** section to add information about an item, such as product color.

7. When you finish entering the item information, click **OK** to return to the Quote dialog box.

   The item is now displayed in the item list.

8. Optionally, add information and comments in the text boxes that are provided.

Applying Discounts to Sales Quotes

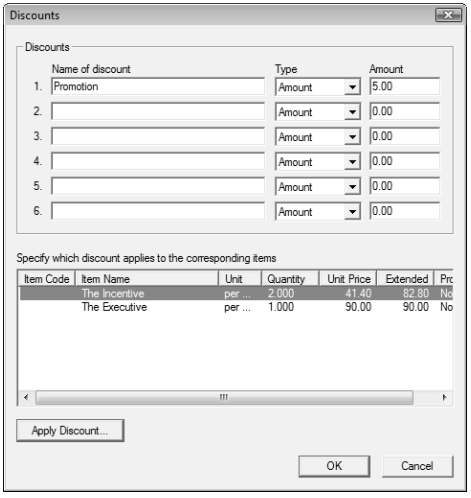
You can apply discounts to any existing sales quotes or to new sales quotes while you are creating them. You can apply discounts to any specific items in the quotes.

➤ To apply a discount to a quote

1. Open the quote.
2. Beside the **Discount** field, click the ellipsis button (in the lower half of the dialog box).

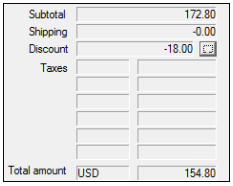
   The Discounts dialog box opens.

3. Add any necessary discounts to the quote.
   - Enter a discount name.
   - From the **Type** drop-down list, select **Amount** or **Percentage**.
   - Enter a fixed amount or a percentage for the discount.



4. Select the item, click **Apply Discount**, and select the name of the discount to apply to the item.
5. Click **OK**.

   The discount amount is displayed in the Discount field.

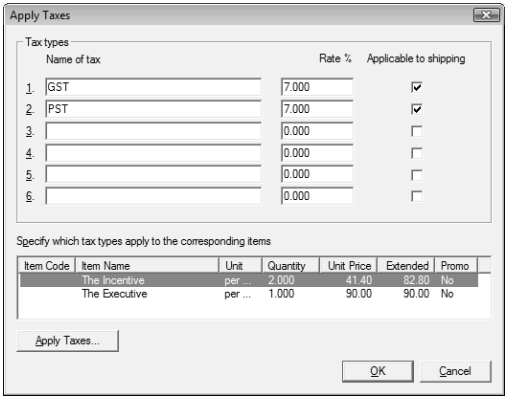


Adding Shipping and Tax to Sales Quotes

Once you have set up your sales quotes, you can specify the shipping and tax information to include it in the sales quote.

➤ To add shipping and tax to a quote

1. Open the sales quote.
2. Select the **Shipping & Tax** tab.
3. Under **Shipping details**, click **Charges** to enter or change shipping costs for each item in the quote.
4. Under **Tax details**, click **Apply Taxes**.
5. Define any necessary tax types.
   - Enter the name of the tax.
   - Specify the tax rate as a percentage.
   - If necessary, specify whether the tax is applicable to shipping.



6. Select an item and click **Apply Taxes** to apply the relevant taxes to the items.
7. Click **OK** to close the Apply Taxes dialog box.
8. Under **Shipping address,** enter the shipping address information manually or click **Retrieve** to retrieve the information from the selected entry.

Item Table Merge Fields

You can create item table merge fields for use with Maximizer Word Processor and Microsoft Word documents. When you insert one of these merge fields, an item table is added to your document.

The item table contains the columns you selected when creating the merge field. The following columns are available to select: Item Name, Item Code, Item Promotion, Item Price, Item Unit, Item Quantity, Item Shipping Cost, Item Extended Price, Item Options (Line separated), and Item Options (Comma separated). The table also contains a row for each product/service item in the sales quote selected for the merge.

All Items						
Item Code	Item Name	Item Promotion	Item Price	Item Unit	Item Quantity	Item Shipping Cost
237892	The Executive	No	90.00	per basket	1	5.00
245698	1997 Zinfandel	No	19.00	each	1	5.00

The following sections contain information on working with item table merge fields:

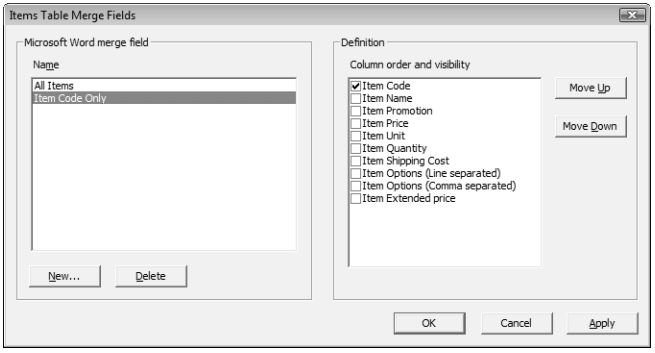
- “Creating Item Table Merge Fields” on page 380
- “Inserting Item Table Merge Fields” on page 381

Creating Item Table Merge Fields

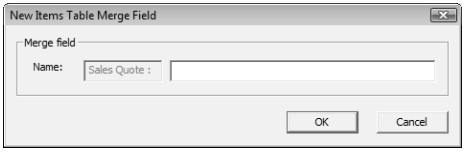
You can create item table merge fields from the OrderDesk window or the Address Book OrderDesk following window.

➤ To create an item table merge field

1. On the **Edit** tab, select **OrderDesk > OrderDesk - Item Table Merge Field Setup**.



2. Click **New**.



3. Enter a name for the merge field and click **OK**.

   Note that the prefix "Sales Quote" is added to every name. This helps you to locate your merge fields in the Insert Merge Fields dialog box.

4. In the **Definition list**, select the table columns you want to add to the merge field.

   To select a table column, click the checkbox beside it.

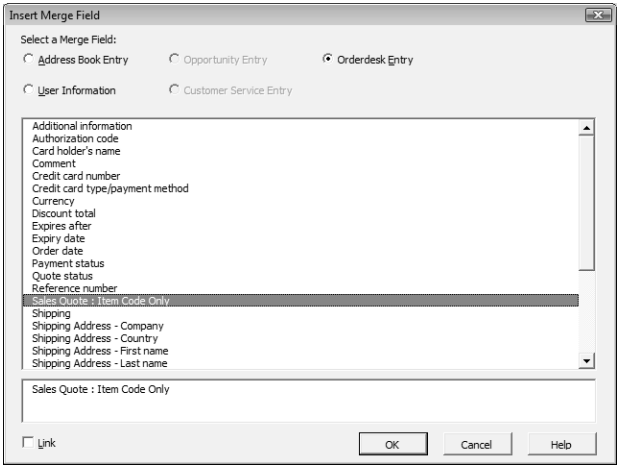
5. If necessary, use the **Move Up** and **Move Down** buttons to arrange the column order.

   The column order in the list represents the column order in the merged table.

6. Click **OK**.

Inserting Item Table Merge Fields

You can insert item table merge fields the same way that you insert any other types of merge fields into Maximizer Word Processor documents or Microsoft Word documents. In the Maximizer Word Processor, you can select the Merge Field icon to insert merge fields. You must have Microsoft Word integration installed to insert merge fields into Microsoft Word documents. You can select the Insert Merge Field icon from the Maximizer toolbar to insert the merge field. In the Insert Merge Field dialog box, select the OrderDesk Entry option to view only merge fields associated with OrderDesk entries.



Catalogs

You can use OrderDesk to create and edit online catalogs. You perform all of your catalog tasks in the Product Catalog dialog box.

The following sections contain information on working with catalogs in OrderDesk:

- "Adding Catalogs" on page 382
- "Adding Catalog Sections" on page 382
- "Adding Catalog Items" on page 383
- "Importing and Exporting Items in Catalogs" on page 384

Adding Catalogs

You can add any number of catalogs to the list of catalogs in the Product Catalog dialog box. You can add catalogs from the OrderDesk window or the Address Book OrderDesk following window. You can also modify and delete existing catalogs from the Product Catalog dialog box.

➤ To add a catalog

1. On the **Edit** tab, select **OrderDesk > Product Catalog**.
2. Click **Add**.
3. In the **Project Title** field enter a name for the catalog.
4. In the **Description** field, enter a catalog description.
5. Click **OK**.

Adding Catalog Sections

Once you've created a catalog, you can add sections to the catalog. The catalog sections store the various items in the catalog. You can add catalog sections from the OrderDesk window or the Address Book OrderDesk following window.

Once you've added multiple catalog sections, you can use the Up and Down buttons to organize the sections in the Catalog Sections list.

➤ To add a section to a catalog

1. On the **Edit** tab, select **OrderDesk > Product Catalog**.
2. In the **Select a Catalog** list, select the catalog to add the section to.

3. Click **Add**.
4. In the **Catalog Section Title** field, enter a name for the section.
5. If necessary, enter a discount rate and a description of the discount.
6. Click **OK**.

Adding Catalog Items

Once you've added catalog sections to your catalog, you can add items to specific sections in the catalog. You can add items to catalogs from the OrderDesk window or the Address Book OrderDesk following window.

You can also modify and remove items from a catalog. If you clear an item in the Catalog Items list, the item will not be available when you use the Get Item Info from Catalog button in the Order or Quote dialog box. This option lets you hide catalog items without deleting them.

➤ To add an item to a catalog

1. On the **Edit** tab, select **OrderDesk > Product Catalog**.
2. In the **Select a Catalog** list, select the catalog to add the item to.
3. In the **Catalog Sections** list, select the catalog section you want to add the item to.
4. Under the **Catalog Items** list, click **Add**.
5. In the **Product/Service**s field, enter a name for the item.
6. Fill in other details as required.

   Note that Regular Price, in the Enter the Pricing Details section, is a required field.
7. Click **OK**.

Importing and Exporting Items in Catalogs

You can import and export items between different catalogs. You can import or export from the OrderDesk window or the Address Book OrderDesk following window.

➤ To import or export catalog items

1. On the **Edit** tab, select **OrderDesk > Import/Export Catalog Items**.
2. Select the catalog you are importing to or exporting from.
3. Follow the wizard instructions to import or export the catalog items, clicking **Next** after each screen.
4. Click **Finish** in the last wizard screen.

Online Orders and Inquiries

When potential customers visit your ecommerce site, they can complete an online form to either inquire about or order products and services. You can use the Maximizer Web Inquiry Form wizard to create online data collection forms to capture this order information. The data from this form—such as name, address, credit card numbers—is then written to the Maximizer Address Book as an Address Book entry with an attached OrderDesk entry.

If you are using eStore, orders and inquiries automatically arrive in the OrderDesk window from your website.

If you are using ecBuilder, orders and inquiries arrive in your Maximizer Email window as email messages with an MEC file attachment. Select "All eCommerce Messages" from the Email window's View bar. Order/inquiry email messages have the subject line "ecBuilder Inquiry", "ecBuilder Order", or a similar subject. You may wish to save the MEC files in their own folder and double-click the files to import the order/inquiry information.

eStore and ecBuilder are components of previous versions of Maximizer. They are supported only for compatibility with older versions of Maximizer.

You can use the OrderDesk window to enter new orders, capture payments for orders, pre-authorize payments for orders, complete pre-authorized payments for orders, and refund payments for orders.

OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled. It lets you mark specific orders or inquiries as urgent, ignore inquiries without deleting them, and track shipping and payment status for your orders.

You can open online orders and inquiries in the OrderDesk window and send summaries of inquiries by email to the associated customers (Address Book entry) with an automatic reply. You also can send a summary of the inquiry to one or more Maximizer users.

Credit Card Transaction Processing

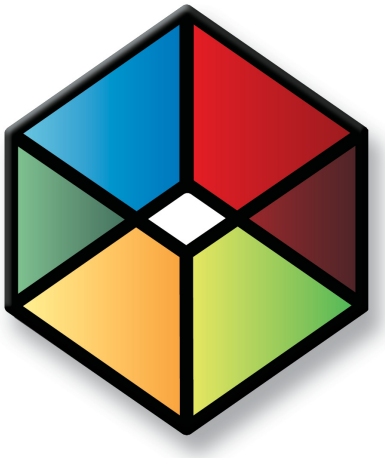
If you are using a third-party transaction processing company, the OrderDesk window acts as a desktop point-of-sale software solution that supports real-time credit card transactions. This includes pre-authorization of credit card information, pre-authorization completion and/or capture of funds, and refunds that generate a credit on the customer's credit card account.

With the use of a transaction processing company, funds from the consumer's credit card can be captured immediately. Once the credit card information has been verified and the purchase has been authorized, the information can be securely forwarded via a confirmation email message to both the consumer and the merchant.

Payment gateway profiles, sometimes referred to as merchant account profiles, are used to facilitate online credit-card transaction processing from your website. When you process an order's credit card transaction using the OrderDesk window, you select the appropriate payment gateway profile from the Payment & Totals tab.

To see which transaction processing companies are supported by Maximizer, select the OrderDesk window. On the Home tab, select OrderDesk > Edit Gateway Settings, and click the Add button in the Edit Gateway Settings dialog box. In the Payment Gateway Profile Properties dialog box, you can view the supported transaction processing companies in the Company drop-down list. There is one payment gateway profile per transaction processing company.

Before you set up a profile in Maximizer, you must contact the company and set up a merchant account. This can be done using the Acquire Merchant Account button in the Payment Gateway Profile Properties dialog box.



CHAPTER 16

MaxExchange Remote

Working with MaxExchange Remote

In this chapter...

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"Glossary of MaxExchange Terms" on page 390
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"Receiving the Address Book" on page 395
"Starting a Processing Session from Maximizer" on page 398
"Processing Packets" on page 400
"Setting MaxExchange Preferences" on page 403
"FTP Transport Method" on page 407
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"Troubleshooting Logs" on page 415

How MaxExchange Programs Work Together

MaxExchange consists of the following applications:

- MaxExchange Synchronization Server
- MaxExchange Remote Synchronization Server
- MaxExchange Server Manager
- MaxExchange Remote
- MaxExchange Site Manager

MaxExchange Synchronization Server

One person is usually in charge of setting up and administering the central Address Book. This MASTER user, or a user with Maximizer Administrator privileges, acts as an administrator for the MaxExchange Server, designates a Maximizer Address Book as the central Address Book—or central Address Books if you are using multiple databases—and schedules updates.

There is only one server for any given Address Book, but one server can have many remotes. These sites are either remote servers or remotes, which can be connected by LAN, WAN, dial-up access, or through the Internet. The central Address Book is maintained on the MaxExchange server, while the remote computers have different replications of the central Address Book.

MaxExchange Server can also be installed as a service on Windows Server 2003, Windows XP, and Windows Server 2008. The service runs in the background, as any other Windows service, and typical processing is done automatically. Manual control of processing or any other server tasks are then done through the MaxExchange Server Manager from another machine or on the server.

MaxExchange Remote Synchronization Server

MaxExchange Remote Synchronization Server acts as a middle tier in a multi-tiered synchronization tree. Remotes run MaxExchange Remote Synchronization Server to synchronize their remote changes with those on the site's parent server, which is either the MaxExchange Synchronization Server or a MaxExchange Remote Synchronization Server.

MaxExchange Remote Synchronization Server has the following two basic functions:

- It synchronizes changes from its remotes with the server and receives updates from the server.
- It generates and sends its own updates to its remotes.

MaxExchange Remote Server acts in the capacity of a server and as a remote. It may be installed as an application and service or as a service only.

MaxExchange Server Manager

MaxExchange Server Manager is a utility used to access the server from another computer. When you install MaxExchange Server as a service, this utility is used to perform manual tasks on the server.

MaxExchange Remote

MaxExchange Remote users synchronize the entire image or a subset image of the central Address Book on their remote computers. Remote users also update the central Address Book with changes made on the remotes.

MaxExchange Site Manager

To determine which portions of the central Address Book go to each remote, using MaxExchange Site Manager, the MASTER user, or a user with Maximizer Administrator privileges, defines remotes/ remote servers and the distribution groups to which the remote sites belong. Other important functions of Site Manager are to perform Address Book maintenance on remotes, send refreshes to remotes, set up event notifications, and generate reports. Site Manager is also used to set up teams for campaign and opportunity synchronization.

MaxExchange Administrator's Guide

For information on using MaxExchange Synchronization Server, MaxExchange Synchronization Remote Server, MaxExchange Server Manager, and MaxExchange Site Manager, refer to the *MaxExchange Administrator's Guide*. This chapter is to be used by remote users, who, typically, would not be the administrators of MaxExchange.

Glossary of MaxExchange Terms

Use this list of terms to help familiarize yourself with the terminology of MaxExchange.

Central Address Book – A Maximizer Address Book that you specify for the MaxExchange server to synchronize with its distribution sites. The server maintains the central, master image of this Address Book (often at the head office of a company), while the remote computers maintain either partial or complete images of the same Address Book on the distribution sites. Note that you can synchronize more than one central Address Book at a time and multiple Address Books can be hosted on one server.

Although different images of the Address Book are kept on separate computers, together, the server and its remotes effectively work on a single central Address Book, which is periodically updated by the MaxExchange synchronization process.

Distribution Group – A Distribution Group comprises several distribution sites that maintain a particular image of the central Address Book. The MASTER user of the central Address Book, or a user with Maximizer Administrator privileges, uses the MaxExchange Site Manager program to determine which distribution sites belong to each distribution group.

The MaxExchange Distribution user-defined field, which you create in Administrator, determines which companies and individuals in your central Address Book are distributed to the various remotes. The field is created in Administrator's System Options preferences by clicking the associated button. This field then appears within your User-Defined Fields list and you add values for your distribution groups as necessary.

Distribution Site – A computer where MaxExchange Remote or Remote Synchronization Server is installed. See the Remote and Remote Server definitions for more information.

DRB Table – A file table that is used by MaxExchange to track the distribution list of Address Book entries and opportunities for each distribution site. This list is created based on the Distribution Group

value associated with an Address Book entry for the MaxExchange Distribution field.

Remote – A computer where a MaxExchange Remote is installed, and on which a partial or complete image of the central Address Book is stored. Remotes are set up and maintained by the MASTER user, or a user with Maximizer Administrator privileges, using the MaxExchange Site Manager program.

Typically, several distribution sites belong to a distribution group. These distribution groups are associated with Address Book entries. You assign default distribution groups to Address Book entries based on the creator of the entry; each user can be assigned a set of distribution groups and when the user creates an entry, the default distribution groups are automatically assigned. User setup for distribution groups is done in the Access Rights tab of user properties in Administrator (File > Users) or Maximizer (in the Setup tab, select Manage Users from the User Management group).

Remote Server – A distribution site that also acts as a MaxExchange server for other distributions sites in an n-tier configuration. The remote server synchronizes with the server (or with another remote server) and passes along data packets to other remotes on the distribution tier below it.

MASTER User – The MASTER user is the owner or the administrator of a Maximizer Address Book. For MaxExchange, the MASTER user administers the central Address Book from the server. The MASTER user grants users access to the Address Book and, if required, restricts their ability to view, add, or delete data or to perform certain functions. The MASTER user is also the only user authorized to use the MaxExchange Site Manager application to set up remotes and distribution groups or use MaxExchange Server Manager. Note that you can have users with Maximizer Administrator privileges equivalent to the MASTER user.

Transaction Journaling – Transaction Journaling is the process by which Maximizer maintains a record of changes made by users to an Address Book.

Transaction Journaling is enabled in Administrator in the System Options preferences. This functionality should not be enabled until you are ready to process data so that unnecessary transactions do not occur.

User-defined field – User-defined fields (UDFs) are customizable fields in Maximizer that you can use to categorize the Address Book entries and opportunities in your Address Books. You can use UDFs to group Companies, Individuals, Contacts, and opportunities in many different ways such as by occupation, hobby, income level, revenue, or any other criteria you want to use.

What Data is Synchronized?

MaxExchange synchronizes all data in an Address Book with the exception of the following:

- Automated campaigns (traditional campaigns are synchronized)
- Email templates for automated campaigns
- Journals
- Expenses
- Graphs
- Import catalogues
- Linked documents
- Printer settings
- Window layouts
- Email settings
- Windows authentication settings
- External third-party tables (non-Maximizer)
- Dashboard settings
- Holiday Editor information

Synchronizing Third-Party Data

There are two custom tables available through the use of the Maximizer Customization Suite (listed below) that allow you to integrate third-party data. The data contained in these tables is synchronized by MaxExchange as follows:

For both the Custom_Independent and Custom_Child tables, the Custom_ID and Custom_Number fields (whether generated automatically or manually entered) on the server and each remote must be unique in a MaxExchange environment. This is to prevent duplicate ID issues from occurring.

- **Custom_Independent** is a top-level data storage table, similar to the Clients table. It is created at database-creation time and contains a number of pre-defined columns. It is always synchronized by MaxExchange, and it synchronizes associated notes, documents, and user-defined fields.
- **Custom_Child** is a mid-level data storage table and is a child of a Custom_Independent record, an Address Book entry, an Opportunity, etc. It is created at database-creation time and contains a number of pre-defined columns, including Client_Id/ Client_Number of the parent record. It is always synchronized by MaxExchange, except on a refresh, in which case child records are synchronized only when the parent record is synchronized. It also synchronizes associated notes, documents, and user-defined fields when the parent record is synchronized.

For more information on using custom third-party tables, refer to the Customization Suite documentation.

Synchronizing Opportunities and Campaigns

Address Book entries with opportunities assigned to sales team members are synchronized to remotes, even when corresponding companies are not normally synchronized to those particular remotes (i.e., the Address Book entries are not assigned to the corresponding distribution group). Synchronization of Address Book entries also occurs when a competitor or partner of an opportunity is assigned to a Address Book entry other than the Address Book entry with which the opportunity is associated.

When a Contact is assigned to an opportunity (on the Basic Information tab of an opportunity), the Contact is not synchronized unless the Contact's Company or Individual entry is assigned to a distribution group.

Single-user opportunities are synchronized with only the remotes that created the opportunities. For example, if Remote A creates a single-user opportunity, it is synchronized with only Remote A. The opportunity will not be synchronized with Remote B. Single-user opportunities created on the server are not synchronized.

This works the same way for traditional campaigns in that traditional campaigns associated with a member of a marketing team, are also synchronized. Automated campaigns are not synchronized to any distribution sites.

Microsoft Outlook Synchronization and MaxExchange Synchronization

In a MaxExchange environment with Microsoft Outlook Synchronization enabled, Maximizer can synchronize with Outlook on a single server or remote only. Otherwise, duplication of entries may occur.

When MaxExchange is installed, and at least one MaxExchange remote has been added as a distribution site, a MaxExchange Location button appears at the bottom of the Outlook Synchronization tab. Clicking this button opens a dialog box containing a drop-down list of MaxExchange servers and remotes for the current Address Book. Select the MaxExchange server or remote where Maximizer will synchronize entries with an Outlook profile for the selected user.

How Do I Receive Updates?

If your computer is set up for email transport, check to see that your email application is running. Then start MaxExchange Remote.

When you communicate with the server for the first time, the server (or a remote server) sends your computer a data packet with an image of all or part of the central Address Book. (Some entries in the central Address Book may not apply to you, so the MASTER user may exclude them from your Address Book image.) From then on, you receive updates to the central Address Book periodically.

You run MaxExchange Remote to synchronize your distribution site changes with those on the server. The same information is then stored on both the server and remote computers, so that all files are part of the same, single central Address Book. Although the exact process depends on the chosen transport method, here is an example of how the synchronization process works:

- The server assembles Address Book updates in packets, and sends them to your computer, and those of other users at other distribution sites. On your computer, MaxExchange Remote then picks up this data, transfers it to a temporary inbox, and later updates or replaces the data in your central Address Book.
- On your computer, MaxExchange Remote assembles Address Book updates in packets, and sends them to the server. MaxExchange server then picks up the data packets, transfers them to a temporary inbox, and updates the server central Address Book files.

Occasionally, you may receive a message from the MASTER user informing you that he or she is sending you a refresh (a fresh replacement image of your MaxExchange data). When the refresh arrives and is processed, MaxExchange Remote deletes and completely replaces the image of the central Address Book currently on your computer with the new, refreshed version from the server.

You can set MaxExchange Remote to check for updates on a regular schedule. Or, if you prefer, you can request an immediate update at any time. See "Performing an Immediate Update" on page 398 for instructions.

Starting MaxExchange Remote

➤ **To start MaxExchange Remote**

- In the **Add-Ins** tab, select **MaxExchange Remote** from the **Office** group. Or, double-click the **MaxExchange Remote icon** on the desktop.

Receiving the Address Book

When your system administrator instructs you to do so, start MaxExchange Remote. You will receive an image of the central Address Book and be prompted to save it in a folder of your choice.

If you plan to employ FTP transport, you must first initiate a MaxExchange FTP communication session with the server and pick up the data packet before you can later process it.

If you are a dial-up email user, be sure to set up MaxExchange Remote for a dial-up connection. For more information, see "Setting Scheduling Options for Dial-Up Email" on page 413.

If you use email or Network Direct transport, you will receive an image of the central Address Book in the "MaxExchange\Inbox\<hexadecimal>" folder on your distribution site computer assuming you have successful data transport from the server. Note that when you receive an image by email the information arrives in the inbox and is moved to the Hexadecimal folder after processing begins.

Please pay special attention to the instructions particular to the transport method your computer will employ with the MaxExchange server. If you are unsure about the transport method you will use, contact your system administrator before proceeding.

➤ **To receive the central Address Book**

1. Ensure that you have received your first data packet from the server on your computer. Your system administrator will inform you of when an initial data packet has been created and when the packet will be transported to your computer.
   - **FTP** – You must first pick up the data packet from the server. For instructions on how to initiate your first MaxExchange FTP transport session, see "Initiating the First FTP Transport Session" on page 397.

- **Network Direct** – In your "MaxExchange\Inbox \<hexadecimal>" folder, look for two files—one with the extension ATT and the other with the extension HDR. If they exist, you have received a MaxExchange data packet.
- **Email** – If you see an email message entitled "MaxExchange Data Packet" in your email inbox, you have received a MaxExchange data packet.

The "hexadecimal" folder is actually a folder named with a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

2. Start **MaxExchange Remote**.

3. Depending on the transport method you plan to employ, the methods for initiating the connection with the server vary as follows:

   - **FTP** – You must start by initiating a communication session with the MaxExchange server. Select **File > Connect New FTP Server**. Enter the server IP address (or the server name), port number, Password (the MAXEXCHANGE password entered at the server), and Address Book ID for this distribution site. Click **OK** when finished.
   - **HTTP** – You must start by initiating a communication session with the MaxExchange server. Select **File > Connect New HTTP Server**. Enter the server URL, password, and Address Book ID for this distribution site. Click **OK** when you are finished.

     MaxExchange should immediately initiate an FTP/HTTP session with the server.
   - **Email or Network Direct** – Click the **Process Data Packets** button.

   A dialog will appear asking for the Address Book you want to designate as your synchronized MaxExchange Address Book. You may select an existing Address Book from the drop-down list or create a new Address Book.

If selecting an existing Address Book from the drop-down list, verify that it is not the central Address Book.

If you create a new Address Book, you must specify a name that is different from the name of the Address Book on the server.

4. After the Address Book has been established, MaxExchange Remote will inform you that a refresh packet is ready to process. Click **Yes**. The processing status is displayed in the MaxExchange window.

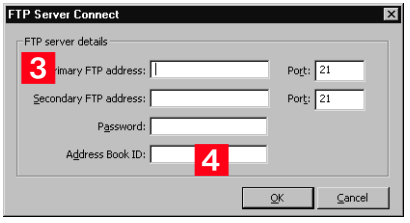
5. When packet processing has ended, open the synchronized Address Book in Maximizer. Examine your data to ensure that it is correct and complete.

Initiating the First FTP Transport Session

MaxExchange FTP transport can be initiated only by the distribution site computer—not the server. Accordingly, a new distribution site needs to enter information into MaxExchange Remote for this transport to start.

➤ To initiate the first MaxExchange transport session with the server

1. You must receive the following information from your system administrator—the server's IP Address and/or server name, the FTP port number, the MaxExchange FTP password, and your unique Address Book ID (hexadecimal number).
2. Select **File > Connect New FTP Server**.
3. Enter the **server's IP** address or server name, the **MaxExchange FTP password**, and your unique **Address Book ID**.
4. Click **OK**. MaxExchange Remote will immediately open an FTP session with MaxExchange server. If the communication is successful and the first data packet(s) is downloaded to your computer, log into your Address Book.



5. Select **File > Process Data Packets**.

After your initial data packet has been processed successfully, the File > Connect New FTP Server dialog is no longer needed for FTP communication to this particular synchronized Address Book. After the initial successful FTP communication session, you need only to select Process Data Packets to start the synchronization process. All future FTP communications will be handled automatically.

Starting a Processing Session from Maximizer

You can start a processing session from Maximizer with a simple click of a button.

➤ To start a processing session from Maximizer

1. In Maximizer, in the **Add-Ins** tab, select **Process MaxExchange Data Packets** from the **Office** group.

   An icon appears in your system tray for MaxExchange Remote. The icon appears differently depending on the state of processing.

   - **Processing –** Shows a connected network.
   - **Processing Finished –** Shows a checkmark.
   - **Failed –** Shows an X

   While processing is taking place, you can click the **Processing** icon to open MaxExchange Remote and view the processing details.

   When the processing session is taking place, the tooltip for MaxExchange Remote says "Processing". After the processing session is complete, the tooltip says "Processing Finished". If the connection to the Address Book or FTP server failed, the tooltip says "Failed". Otherwise, the tooltip says "MaxExchange Remote".

2. After the processing session, you can close or open MaxExchange Remote by right-clicking on the system tray icon and choosing **Exit** or **Restore**.

If you pause a processing session and exit MaxExchange Remote, the process starts from the beginning the next time you process packets.

Performing an Immediate Update

When required, you can perform an immediate update of the central Address Book. MaxExchange Remote checks for incoming changes from the MaxExchange server, then makes these changes to the central Address Book.

After the incoming changes have been processed, MaxExchange Remote prepares and sends data packets to the server for redistribution to its other distribution sites. Once the overall synchronization is complete, the whole central Address Book (both on the server and at the distribution sites) is up to date.

If you are using email as a transport method, your computer must be running and the email system must be operating for MaxExchange to perform an immediate update.

Your computer must have MaxExchange Remote running, all necessary transport resources must be enabled (e.g., modem turned on), and required transport access to the server must be available.

➤ To perform an immediate update

- Click the **Process Data Packets** button or select **File > Process Data Packets**.

  MaxExchange Remote updates the central Address Book by first checking for updates from the server and processing them, then preparing and distributing your local changes back to the server for redistribution. (If you enable Remote Dial-up, the order of these processes may be reversed. See "Setting Scheduling Options for Dial-Up Email" on page 413 for more information.)

  Regardless of which transport method is used, Process Data Packets simply creates a data packet and puts it into a folder for transport to the server.

  - **FTP** – The data packet files—.ATT and .HDR—are created and put into the \maxexchange\outbox\<hexadecimal> folder. The distribution site computer will later initiate an FTP transport session and pick up the packet.

    The "hexadecimal" folder is actually a folder named with a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

  - **Network Direct** – A new data packet is created (.HDR and .ATT files) and put into a folder for transport. When the data packet is in the folder, the packet is transported immediately if you have selected Simultaneous in the Processing and Transport Times dialog box.
  - **Email** – The data packet is sent immediately to your local email outbox, encapsulated in an email message, and transported during your next email session.

Processing Packets

The following sections describe how to process packets from MaxExchange remotes.

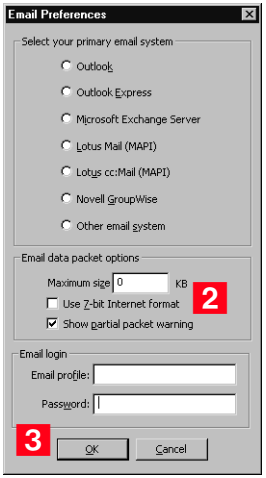
- "Converting Outgoing Packets for Internet Transport" on page 400
- "Restricting the Size of Packets" on page 401
- "Disabling the Partial Packet Warning Message" on page 401
- "Saving Outgoing Packets to Disk" on page 402
- "Importing a Server Packet" on page 402

Converting Outgoing Packets for Internet Transport

Internet email uses a different encoding standard than many LAN email packages. Therefore, if you send data packets over the Internet to the MaxExchange server, the packets must be converted to 7-bit Internet format.

➤ To convert packets for Internet transport

1. Select **Edit > Email Preferences**.
2. Select **Use 7-bit Internet Format**.
3. Click **OK**.



All subsequent data packet files are converted to 7-bit Internet format before being sent to the server.

Restricting the Size of Packets

Depending on the potential size of the updates or the file size limits specified in your email system, you may need to limit the size of your MaxExchange data packets to prevent data from being lost.

➤ To limit the size of packet files

1. Select **Edit > Email Preferences**.
2. In the **Maximum Size** field, specify the maximum size of the file in kilobytes (KB). (If you do not know your file size limit, consult your network administrator or email documentation.)

   For no limit on data packet size, leave the field blank.
3. Click **OK**.

   MaxExchange Remote ensures that no subsequent data packets are larger than the size you specified.

Disabling the Partial Packet Warning Message

If you set a maximum packet size above, packets created by MaxExchange that are larger must be split into multiple packets that do not exceed the maximum size. Until all such partial packets are received, the distribution site cannot process any of the complete packets' parts. When MaxExchange Remote cannot process because all of the partial packets are not received, it displays a Partial Packet Warning dialog.

The Show Partial Packet warning dialog is enabled on installation. When this warning dialog is enabled, you must respond to the dialog before other packet processing can continue. If the warning dialog is disabled, packet processing can continue without your response, but partial packet occurrence may go unnoticed.

➤ To disable the Partial Packet Warning dialog

1. Select **Edit > Email Preferences**.
2. Deselect (disable) the **Show Partial Packet Warning** checkbox.
3. Click **OK**.

Saving Outgoing Packets to Disk

When necessary, you can save outgoing data packets to disk such as floppy diskettes or other removable media, so the packets can later be imported by the MASTER user into the MaxExchange server.

➤ To save a packet to disk

- Select **File > Save to Disk**.

  The Save to Disk menu item in the File menu should now have a check mark next to it.

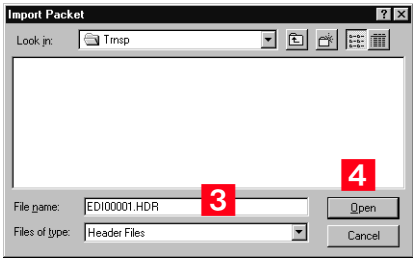
All subsequent data packets are saved to disk instead of being transmitted by email. Once the data packets have been saved to disk, you must send the disks to the MASTER user at the server location.

Importing a Server Packet

There may be times when you receive data packets from the MaxExchange server that were saved to disk or a hard drive directory (folder).

➤ To import a server packet

1. Insert the appropriate disk containing the server data packet in your disk drive.
2. Select **File > Import Packet**.
3. Specify the location and file name of the server data packet.
4. Click **Open**.



The data packet is copied to a processing queue and will be applied to the central Address Book during the next processing of data packets.

Setting MaxExchange Preferences

The following sections describe how to set and view preferences and properties in MaxExchange:

- "Setting Timing Preferences" on page 403
- "Viewing Synchronized Address Book Properties" on page 405
- "Viewing Distribution Preferences" on page 405

Setting Timing Preferences

Timing Preferences in the Edit menu schedules updates for all transport except dial-up email. This includes FTP, Network Direct transport, and LAN email. You can set how frequently MaxExchange Remote processes data packets. At the interval you specify, MaxExchange Remote will transport its updates to the MaxExchange server.

For MaxExchange synchronization to occur successfully, you must ensure the following:

- Your computer is on.
- MaxExchange Remote is running.
- All necessary transport resources are enabled (for example, the modem is turned on).
- The required transport access to the server is available.

➤ To set timing preferences

1. Select **Edit > Timing Preferences**.

   In the Timing Preferences dialog box, specify your processing and transport times. The behavior of each option depends on the Transport Method used.

2. Choose **Manually** (transports packets immediately after the initiation of a processing session), **Simultaneously** (transports immediately after processing), or **Independently** (process and transport at different times).

3. Transaction Processing Settings allow you to set processing to be activated automatically at a specific time.

   If no First Process time or Processing Interval is set, data packet processing will occur only when you do immediate processing using the File > Process Data Packets command.

   If you want to schedule a data processing time, enter the fields as follows:

- In the **First Process At** field, type the **time** at which processing is to start for the first time after these settings are changed. Specify the time in 12-hour format; for example, 7:00 PM.
- In the **Processing Interval** field, type the **frequency** and select the units for how often processing should occur; for example, every 15 minutes. You can select intervals as short as every 1 minute or as long as every 24 hours.

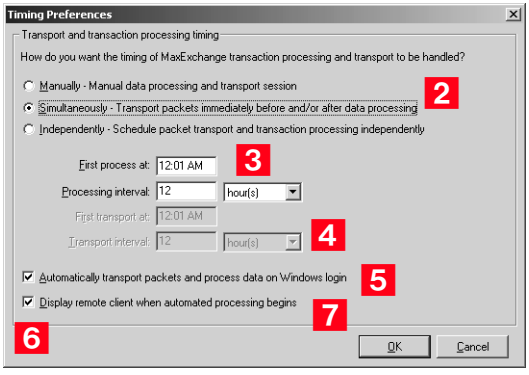
4 Transport Time Settings are available only when Independently is chosen above. These settings allow you to transport packets at times independent of when you process data packets.

- In the **First Transport At** field, type the time at which transport is to start for the first time after these settings are changed. Specify the time in 12-hour format; for example, 7:00 PM.
- In the **Transport Interval** field, type the frequency and select the units for how often transport should occur; for example, every 15 minutes. You can select intervals as short as every 1 minute or as long as every 24 hours.

5 Select the **Automatically transport packets and process data on Windows login** option to automatically start processing when you log into Windows.

6 Disable the **Display remote client when automated processing begins** option if you do not want the MaxExchange Packet Transport dialog box to appear during an automated processing session. The MaxExchange Remote processing icon will still appear in the Windows system tray.

7 Click **OK**.


Timing Preferences
Transport and transaction processing timing
How do you want the timing of MaxExchange transaction processing and transport to be handled?
Manually - Manual data processing and transport session
Simultaneously - Transport packets immediately before and/or after data processing
Independently - Schedule packet transport and transaction processing independently
2
First process at: 12:01 AM
3
Processing interval: 12 hour(s)
First transport at: 12:01 AM
Transport interval: 12 hour(s)
4
Automatically transport packets and process data on Windows login
5
Display remote client when automated processing begins
7
6
OK
Cancel

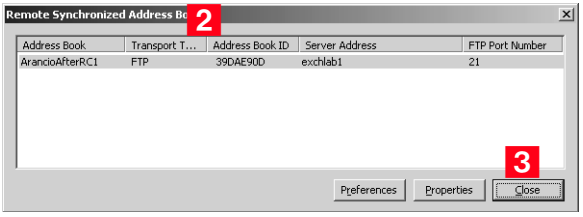
You must exit and restart MaxExchange Remote for your changes to take effect.

Viewing Synchronized Address Book Properties

You may view certain transport information for every synchronized Address Book on a distribution site computer. MaxExchange reads transport information contained in the MXZREM.BIN file in the "MaxExchange" program directory.

➤ To view synchronized Address Books on a remote computer.

1. Select **View > Synchronized Address Books**.
2. The **Address Book name**, its **transport method**, **Address Book ID**, **server address**, and **server port number** are shown. You can change the server address and port number if necessary.
3. When finished viewing, click **Close** to exit the dialog.

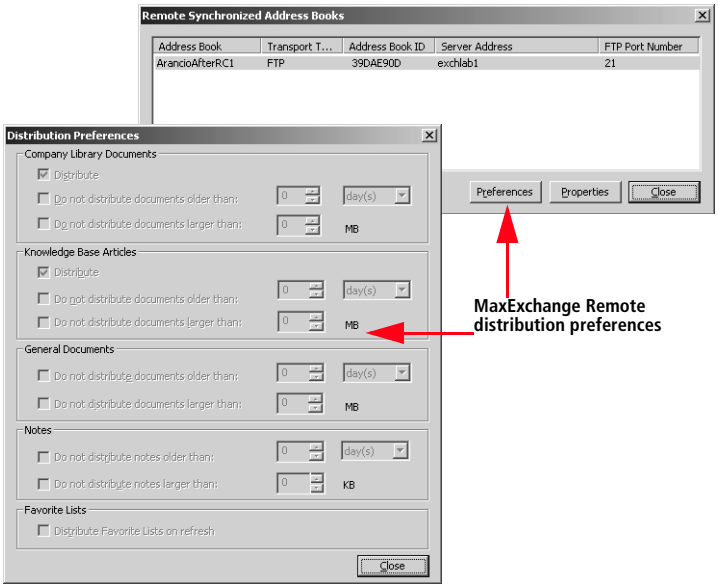


Viewing Distribution Preferences

➤ To view distribution properties

- The distribution preferences can be viewed in MaxExchange Remote by clicking the **Preferences** button while viewing the

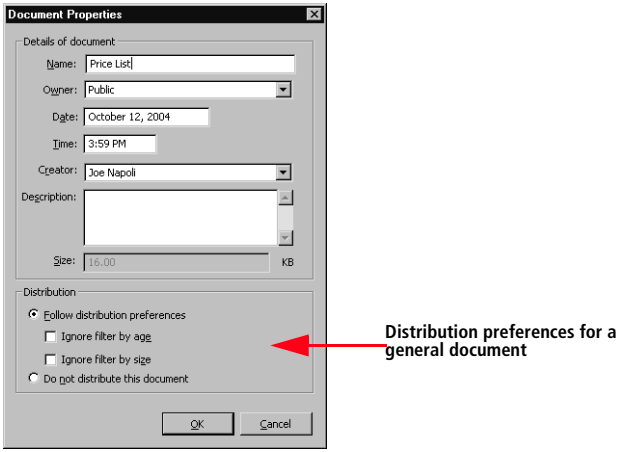
synchronized Address Book properties (**View > Synchronized Address Books**).



➤ To view distribution properties in Maximizer

Note that these Distribution attributes (other than the default preferences option) override the preferences set in MaxExchange Site Manager.

- Distribution preferences appear as part of the properties for Company Library documents, knowledge base articles, general documents, and notes (right-click on one of these items and choose **Properties**). Only the MASTER user has rights to change these preferences in the Properties dialog box (in Maximizer).



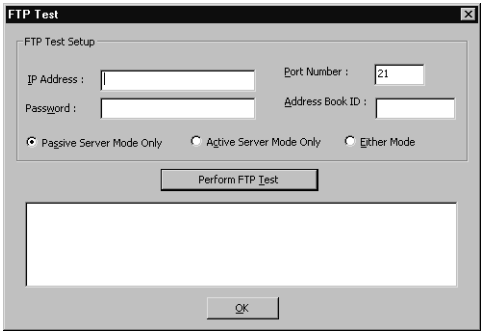
FTP Transport Method

The following sections include instructions that apply only to the FTP transport method.

- "FTP Test Option" on page 407
- "Retrying an Unsuccessful FTP Connection" on page 408
- "Connecting by Dial-Up Using FTP" on page 409
- "Changing Your MaxExchange FTP Password" on page 410

FTP Test Option

If the connection fails, try using the FTP Test functionality. This is a method to test the FTP connection providing detailed information of why a connection fails, if necessary.



If the FTP test is successful,the fields are automatically populated with the successful test settings when you initiate a new FTP connection with the server.

Retrying an Unsuccessful FTP Connection

If you attempt an initial FTP communications session and receive notification from the program of FTP communication failure, select File > Retry FTP Server Connect to re-enter your FTP settings and re-establish an FTP session with the server.

➤ To retry a failed FTP communication session with the server

1. Select **File > Retry FTP Server Connect**.
2. Verify that you have entered the correct server's IP Address and/or server name, FTP port number, the MaxExchange FTP password, and your unique Address Book ID.
3. Click **OK**.
4. MaxExchange Remote immediately opens an FTP session with MaxExchange server. If the communication is successful and the first data packet(s) is downloaded to your computer, log into your Address Book.
5. Select **File > Process Data Packets**.

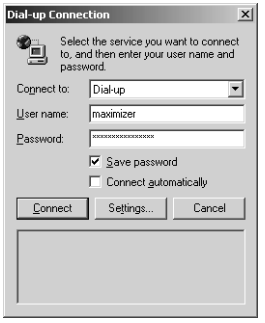
   After your initial data packet has been processed successfully, the File > Retry FTP Server Connect dialog is no longer needed for FTP communication to this particular synchronized Address Book. After the initial successful FTP communication, you need only to select Process Data Packets to start the synchronization process. All future FTP communications will be handled automatically.

Connecting by Dial-Up Using FTP

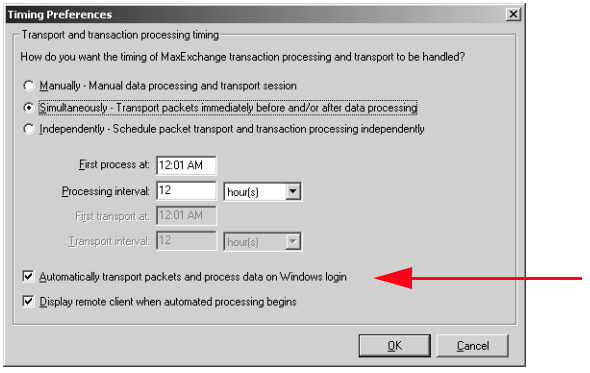
When you are using FTP, the connection between the server and remote is always initiated from the remote computer. This can be done through a LAN or a dial-up connection. If a remote is set up for dial-up connections and a connection fails, a Windows Dial-up Connection dialog box appears when a processing session is initiated. This includes when a processing session is automated.

➤ To connect by dial-up using FTP

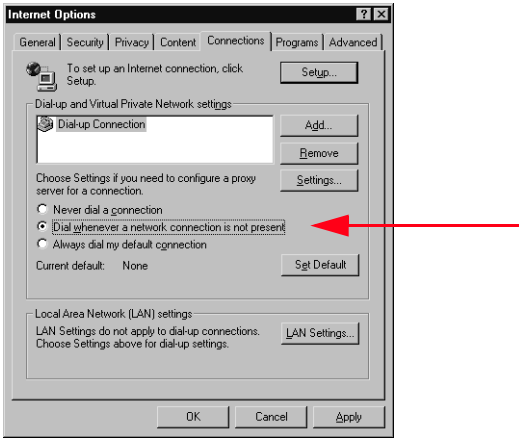
- Click the **Connect** button. You can enable the **Connect automatically** option if you want to dial in to your Internet service provider when you start a processing session.



If you have set up your remote computer to process upon startup, the Windows Dial-up Connection dialog box automatically appears when you log on to Windows. Otherwise, when you click the Process Data Packets on the remote computer, the Dial-up Connection dialog box appears.


Timing Preferences
Transport and transaction processing timing
How do you want the timing of MaxExchange transaction processing and transport to be handled?
Manually - Manual data processing and transport session
Simultaneously - Transport packets immediately before and/or after data processing
Independently - Schedule packet transport and transaction processing independently
First process at:
12:01 AM
Processing interval:
12
hour(s)
First transport at:
12:01 AM
Transport interval:
12
hour(s)
Automatically transport packets and process data on Windows login
Display remote client when automated processing begins
OK
Cancel

Note that in your Internet Options, the **Dial whenever a network connection is not present** option on the Connections tab must be set in order for the Windows Dial-up Connection dialog box to appear.



Changing Your MaxExchange FTP Password

When the MAXEXCHANGE user profile Password changes, all distribution sites need to receive this information so that they can access the MaxExchange FTP server.

The MAXEXCHANGE Password can be changed only at the server using the MaxExchange Site Manager. When the Password is changed, and the change is processed by the server, the change is contained in a data packet for each distribution site to pick up.

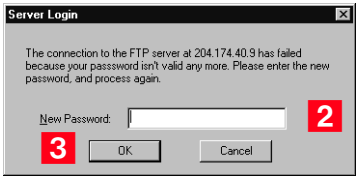
➤ Changing your MaxExchange FTP password

1. Click **Process Data Packets**. The data packet containing the Password change is downloaded to your computer.

   If your computer is set to use FTP transport, and the server FTP password has been changed, you will receive the Server Login dialog:

2. Enter the password given to you by your system administrator.

3 Click **OK**.


Server Login
The connection to the FTP server at 204.174.40.9 has failed because your passsword isn't valid any more. Please enter the new password, and process again.
New Password:
2
3
OK
Cancel

To process any additional packets retrieved after the Password change, click Process Data Packets once again.

Email Transport Method

The following sections include instructions that apply only to the Email transport method.

- "Changing Email Preferences" on page 411
- "Changing Email from LAN to Dial-Up or Vice Versa" on page 413
- "Setting Scheduling Options for Dial-Up Email" on page 413

Changing Email Preferences

To optimize MaxExchange Remote operations when using email data transport, you may specify the email system you plan to use in the Email Preferences dialog box.

When you select your email system in the Email Preferences dialog box, MaxExchange accounts for the differences in the third party email software to ensure proper transport operation.

Email preferences should not have to be changed except under the following circumstances:

- You are installing MaxExchange Remote and your chosen transport method is email.
- You are changing your email application software.
- Your transport method is changed to email.

➤ To set email preferences

1 Select **Edit > Email Preferences**.

2 Select the **email system** that applies to your computer.

3 Specify the **maximum size** of any single packet in kilobytes (KB). This applies to the outgoing packet size on the remote. Email packets are then limited to this size. If a packet is larger than this limit, the packet is spanned into smaller packets within the limit. If the limit is set to 0, the packet size is unlimited.

4 Indicate whether to convert packets so they can be sent over the Internet in its standard, **7-bit** email format. If you send packets over the Internet, you must select this option to ensure that they are reliably transmitted.

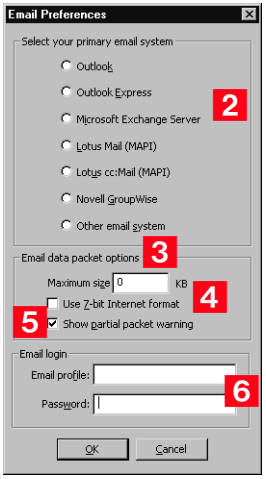
5 Enable the **partial packet warning** if necessary.

When the size of a packet exceeds the maximum size set for a packet (if enabled in Maximum Size above), partial packets are created. The sum of these partial packets makes up the entire data packet. For instance, take an example where a system administrator sets the limit on packets to 2 MB (or 2000 KB). Assume that the Server creates a large data packet that is 3.5 MB or 3500 KB. MaxExchange will break this packet into 2 partial packets. If only one of these data packets arrives, but the other is still in transit, the data from the first partial data packet cannot be processed until the second partial data packet is received as well.

6 Enter your email account **Email profile/User name** and **password** (if required). The available options vary depending on what type of email application you are using.

7 Click **OK**.

Email account information is set up after your email application is installed. If you are using Microsoft Outlook, you can access this information through the Windows Control Panel. See your system administrator for more information.



Changing Email from LAN to Dial-Up or Vice Versa

To change a distribution site computer from a LAN remote to dial-up remote, or vice versa, you must make changes to both the MaxExchange Remote settings and your current mail driver on the distribution site computer.

➤ To change a LAN email remote to a dial-up email remote

1. Select **Edit > Remote Dial-Up Preferences**. Set all time fields in the Process and Transport Timing group box and select the Enable Remote Dial-Up checkbox.
2. Change your current mail driver from Network to **Remote**. Contact your system administrator for additional details.
3. Ensure that the automatic dial-up time of your email communications program corresponds to the processing and communication times set above.

Setting Scheduling Options for Dial-Up Email

If you are using dial-up email to exchange updates with the MaxExchange server, you can set a schedule for processing and sending the updates.

You can set up MaxExchange Remote and your email connection to automate the process of dialing into the email system and sending and receiving central Address Book updates. When you set up an automatic dial-up schedule, you do not need to see MaxExchange Remote again until you want to change its settings. You simply set your email application to automatically connect using the same schedule you set for MaxExchange Remote. For more information about scheduling email connections, see the documentation for your email program.

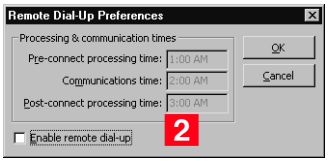
Remote dial-up scheduling can be used only when the following conditions are present:

- Email is the Active Transport Method for your MaxExchange data transport.
- The third-party email program you employ has its remote email client/driver set.

When dial-up email is not installed, the Edit > Remote Dial-Up Preferences dialog is unavailable.

➤ To set remote dial-up scheduling options

1. Select **Edit > Remote Dial-Up Preferences**.
2. In the Remote Dial-Up Preferences dialog box, select the **Enable Remote Dial-Up** checkbox.



3. In the Pre-Connect Processing Time field, type the time at which you want to create outgoing data packets for later transmission to the server.
4. In the Communications Time field, type the time at which you want the update data packets placed in your email outbox.

   You must configure your email program to connect and send and receive mail separately. You should set it to do so sometime later than the Communications Time.
5. In the Post-connect Processing Time field, type the time at which you want MaxExchange Remote to process incoming data packets from the server to update your image of the central Address Book.
6. Click **OK**.

Troubleshooting Logs

The following sections describe how to set up and view MaxExchange troubleshotting logs.

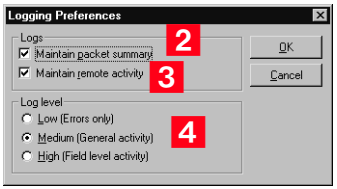
- "Setting Up the Troubleshooting Logs" on page 415
- "Checking the Troubleshooting Logs" on page 416

Setting Up the Troubleshooting Logs

You can log MaxExchange Remote activity in troubleshooting logs. MaxExchange Remote creates two logs for each synchronized Address Book (a Packet Summary Log, [AddressBookName]_packlog.txt, and a Remote Activity log, [AddressBookName]_log.txt), both of which are text files located in the same directory (folder) as your MaxExchange programs.

➤ To create logs

1. Select **Edit > Logging Preferences**.
2. To log when data packets are received by your computer, select **Maintain Packet Summary**. Log information is saved in the text file [AddressBookName]_packlog.txt.
3. To log detailed information about when data packets are sent and received, and what happens to them, select **Maintain Remote Activity**. Log information is saved in the file [AddressBookName]_log.txt.
4. Indicate the **level of log detail** you want to see in the [AddressBookName]_log.txt:
   - To log errors only, select Low.
   - To log record-level updates (additions, changes, and deletions of Maximizer entries), select Medium.
   - To log field-level updates (details of changes within Maximizer entries), select High.
5. Click **OK**.



Checking the Troubleshooting Logs

If you employ email transport, you may also check your email system's conversation log for more information.

If you have set the troubleshooting logs to record MaxExchange activity, you can check the logs when you experience problems during a synchronization session or suspect that updates are not being sent or received.

Remote Activity Log ([AddressBookName]_log.txt)

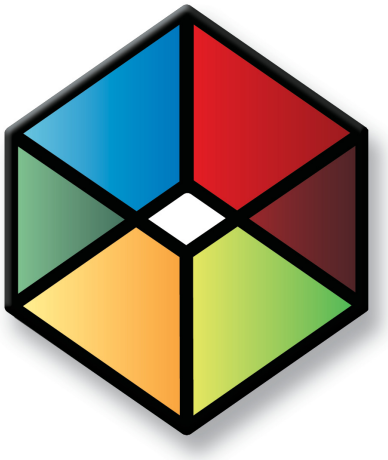
Check the [AddressBookName]_log.txt by selecting View > Remote Activity Log. The [AddressBookName]_log.txt file can include:

- The number of information packets sent.
- The number of information packets received.
- The number of additions, updates, and deletions made to your image of the central Address Book.

The contents of the log depend on the detail level you set when configuring MaxExchange Remote's log file.

Packet Summary Log ([AddressBookName]_packlog.txt)

For information about the date and time information packets were received, check the [AddressBookName]_packlog.txt by selecting View > Packet Summary Log.



CHAPTER 17

Administration for Maximizer

Manage your Address Book

In this chapter...

"Backing Up Address Book Data" on page 418
"Exporting Address Book Data" on page 421
"Importing Address Book Data" on page 429
"Transferring Entries Between Address Books" on page 436
"Enabling TAPI" on page 439
"Updating Maximizer with Live Update" on page 444
"Changing Languages for the Maximizer Spell Checker" on page 445

Backing Up Address Book Data

You can back up and restore Maximizer Address Book data. If your Address Book uses a custom dictionary or holidays you must back up this data separately from the Address Book. After creating backup copies of your Address Book, you can restore the Address Book using Administrator.

For information on backing up Address Books in Maximizer CRM Enterprise Edition, see the *Maximizer CRM Administrator's Guide* and your Microsoft SQL Server documentation.

The following two backup procedures are available in Maximizer CRM Group Edition:

- **Regular Backup –** This backup procedure requires the Address Book to be closed and must be done in Administrator. See the *Maximizer CRM Administrator's Guide* and Administrator Help for assistance
- **Quick Backup –** This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either Administrator or Maximizer. If security is enabled, you will need access to the MASTER user password.

The following sections contain information on backing up Address Book data in Maximizer:

- "Quick Backup" on page 418
- "Backing Up the Dictionary and Holiday Files" on page 420

Quick Backup

You can use the Quick Backup command in Maximizer CRM Group Edition. The advantage of using Quick Backup over a regular backup is that you can perform frequent backups of any open Address Book.

If you are backing up a global Address Book from a workstation, the backup is automatically saved to the default SQL Server Express backup folder. You do not have the option to save the backup to a different location.

By default, the backup is saved to the current Address Book folder. If you don't want to save the backup to this location, you can browse to another one.

If you choose to save the backup to the default location, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files.

The backup file name includes the current date as an identifier. For example, the following backup file was created from a Quick Backup performed on March 23, 2007. (The backup was saved to the following default location).

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20070815_01.BAK

The "_01" is added to the file name to differentiate between backups from the same day, so a second backup on the same day would be saved as follows:

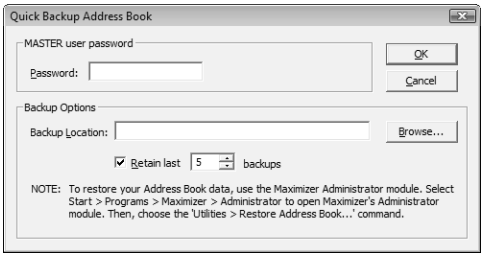
C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20070815_02.BAK

Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

➤ To perform a Quick Backup

1. Open the Address Book to back up.
2. In the top-left corner of the window, click the **Maximizer** button, and select **Quick Backup**.

   The Quick Backup Address Book dialog box opens.


Quick Backup Address Book
MASTER user password
Password:
OK
Cancel
Backup Options
Backup Location:
Browse...
Retain last
5
backups
NOTE: To restore your Address Book data, use the Maximizer Administrator module. Select Start > Programs > Maximizer > Administrator to open Maximizer's Administrator module. Then, choose the 'Utilities > Restore Address Book...' command.

3. Enter the MASTER user password.

   If this field is disabled, continue to the next step.
4. Select the backup folder:
   - To save the backup file to the default location (Address Book folder), leave the **Backup Location field** blank.
   - To save the backup file to a different location, click **Browse**. Select a folder and click **OK**.

     The location is displayed in the Backup Location field.
5. If necessary, specify the number of previous backups to retain:

   This step is necessary in the following cases:
   - You are backing up a local database on a workstation.
   - You are backing up a global or local database on a server machine.
6. Click **OK** to begin backing up.

   When the Quick Backup is complete, a message box confirms that the backup was successful. The backup file name and location are displayed.

Maximizer
The database EsconaTutorial has been backed up to C:\ProgramData\Maximizer\AddOns\EsconaTutorial\Backup\EsconaTutorial_20070815_01.bak on your database server.
OK

7 Click **OK**.

Backing Up the Dictionary and Holiday Files

The Maximizer dictionary and holiday files are not backed up as part of the Address Book backup procedures. Therefore, if you have customized the dictionary or holidays, you need to back up those files separately, especially before upgrading or re-installing Maximizer.

Holiday files are created in Holiday Editor in Administrator. The holidays listed in the Holiday Editor appear in the Calendar in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

To back up the dictionary and holiday files, copy them from the following location and paste them to another location, preferably the same location where your Address Book is backed up.

The user dictionary file is unique to each Maximizer workstation, so you will need to back up this file for each workstation.

User Dictionary File Location:

C:\Program Files\Maximizer\MaData6\Userdict.lexHoliday File Location:

By default, the Maximizer program folder is C:\Program Files\Maximizer. If Maximizer was installed in a different folder, then change the path accordingly.

C:\Program Files\Maximizer\MaData6\Mxzhol.nam

Exporting Address Book Data

You can export Address Book entries, customer service cases, and knowledge base articles from Maximizer, not Administrator.

Encrypted user-defined fields cannot be exported.

Exporting Address Book entries creates a text file or XML file containing information from the current Address Book. It exports any Companies and Individuals selected in the Address Book list. If no Address Book entries are selected, it exports all Companies and Individuals currently displayed in the list.

The following sections contain information on exporting Address Book data from Maximizer:

- "Exporting Address Book Entries in XML Format" on page 421
- "Exporting Address Book Entries in Text Format" on page 423
- "Selecting Fields for Export" on page 426
- "Exporting Customer Service Cases" on page 426
- "Exporting Knowledge Base Articles" on page 428

Exporting Address Book Entries in XML Format

By default, exporting Address Book entries in XML format exports name, address, phone number, email address, and company details information from the Basic Information tab of the selected Companies and Individuals (or all entries in the list if none are selected). You can then easily import this file into another Maximizer Address Book.

The unique ID is exported with each Company or Individual, but unique IDs for contacts are not exported.

You can optionally export the following additional information:

- **Include contacts** exports the contacts associated with the exported Address Book entries.
- **Include Customer Service Cases** exports customer service cases associated with the exported Address Book entries.
- **Include Opportunities** works the same way as Include Customer Service Cases from above. It exports opportunities associated with the exported Address Book entries.
- **Include UDFs** exports all Address Book user-defined fields associated with the exported Address Book entries, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time required for the export process, and not selecting this option improves speed.

Formula user-defined fields are exported as alphanumeric, date, or numeric user-defined fields. The values are exported, but they will not be recalculated after export.

- **Include notes** exports notes associated with the exported Address Book entries, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported Address Book entries, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported XML file to Unicode format, which is required for languages using more than one byte per character, such as Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

➤ To export Address Book entries in XML format

1. In Maximizer, open the Address Book window, and select the Companies and Individuals to export.

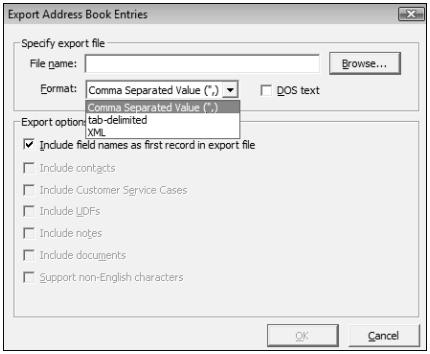
   – or –

   Don't select any entries to export all entries currently displayed in the Address Book list.

2. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Address Book entries**.

   The Export Address Book Entries dialog box opens.

3. From the **Format** drop-down list, select **XML**.



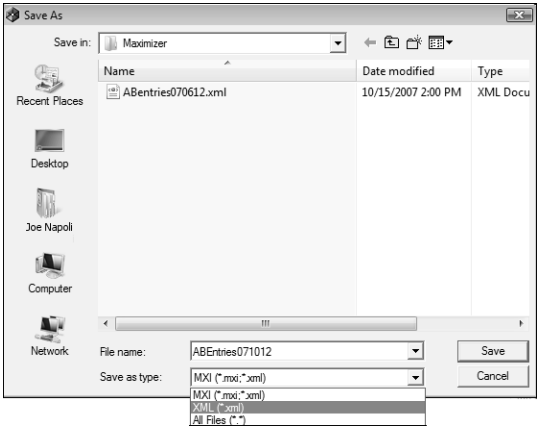
4. Click **Browse**.

   The Select Export File dialog box opens.

5. Specify the destination location and file name for the exported file.

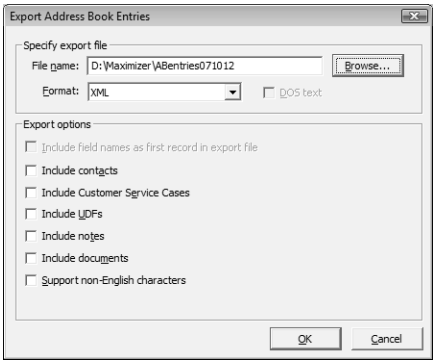
6. In the **Save as type** drop-down list, select either **MXI** or **XML**.

7 Click **Save**.



8 Select any of the Export options, as needed.

9 Click **OK**.



Exporting Address Book Entries in Text Format

You can export Address Book entries in the following text formats: comma-separated values (CSV) and tab-delimited. User-defined fields that contain more than one item are not supported in a CSV or tab-delimited export. Use XML export instead.

Exporting to comma-separated values (CSV) format creates a file with a .CSV extension, which is readable by spreadsheets such as Microsoft Excel and many other programs.

Exporting to tab-delimited format creates a text (.txt) file with tabs separating each field value. This file is readable by any program that supports .txt files.

Exporting to these formats exports selected Companies and Individuals in the Address Book, but you do not have the option of exporting Contacts.

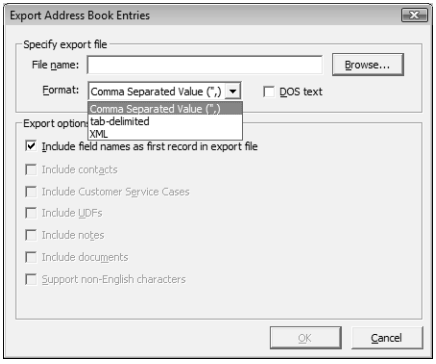
Unlike XML format, exporting to CSV and tab-delimited format enables you to specify individual fields to export, including Address Book user-defined fields.

You can also export notes associated with the Companies or Individuals. You have the option of exporting all notes or most recent notes.

➤ To export Address Book entries in CSV or tab-delimited format

1. In Maximizer, open the Address Book window.
2. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Address Book Entries**.

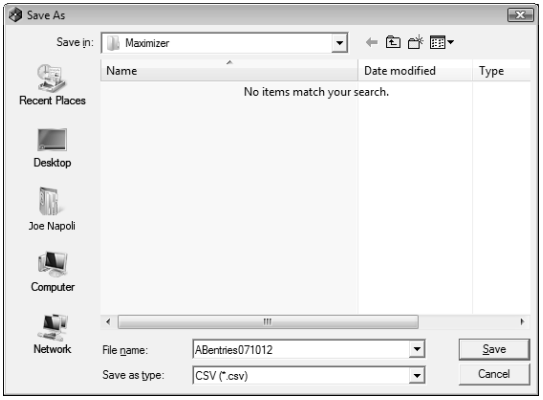
   The Export Address Book Entries dialog box opens.
3. From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.



4. Click **Browse**.

   The Select Export File dialog box opens.
5. Specify the destination location and file name for the exported file, and click **Save**.

   You can verify that the format you selected previously appears in the **Save as type** field.

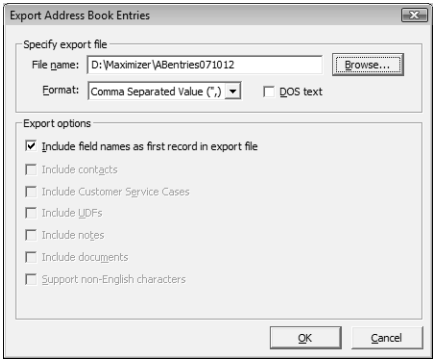


6 Specify the remaining export options.

- To export data that is in DOS standard ASCII, select the **DOS text** checkbox.

  If the data is in ANSI ASCII (Windows default), do not select the checkbox.

- To export the field names exported as the first record in the exported file, similar to a headings row, select the **Include field names as first record in export file** checkbox.



7 Click **OK**.

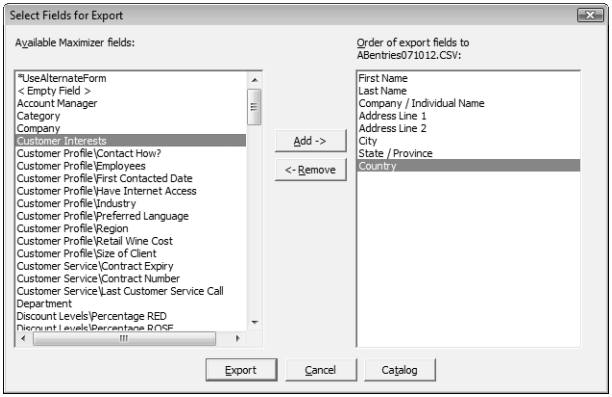
The Select Fields for Export dialog box opens.

8 From the **Available Maximizer fields** list, select each field and clicking **Add**.

– or –

Click **Catalog** to retrieve a previously saved export list.

For more information, see “Selecting Fields for Export” on page 426.



9 Click **Export** to begin the export process.

Selecting Fields for Export

When exporting to CSV or tab-delimited format, you must select which fields to export, and in which order. The Select Fields for Export dialog box has two columns: the left column lists the Address Book entry basic fields, user-defined fields, and two fields for notes; the right column is initially blank. Select the fields to export from the left column and add them to the right column.

The order of fields in the right column is the order in which they will be exported. If you need to change the order of any fields, select each one and click Remove to delete it from the list; then, in the right column, select the field after which you want to place another field. Fields added to the right column appear directly below the field currently selected in the right column.

Once you have established the order of export fields as you would like it, you can click the Catalog button to save the export list for future exports. In the Export Catalog dialog box, click Add to create a new saved export list, or click Save to overwrite an existing export list. The Retrieve button opens an existing export list.

Exporting Customer Service Cases

You can export customer service cases, their associated Address Book entries, as well as any related user-defined fields, notes, or documents. Exporting customer service cases exports any cases that have been selected in the Customer Service window (or all cases in the list if none are selected). The export file can be either Maximizer XML Interface (MXI) or XML format.

MXI and XML files are both in XML format. However, you can import into Maximizer with MXI files more easily than XML format. To

import an MXI file, simply double-click the file and it automatically handles the import.

You can also export customer service cases from the Export Address Book Entries dialog box, but doing so only exports cases associated with the exported Address Book entries. For more control over which cases are exported, use Export Customer Service Cases.

The Export Customer Service Cases dialog box includes the following options:

- **Include UDFs** exports all Customer Service user-defined fields associated with the exported cases, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time to export, and not selecting this option improves speed.

Formula user-defined fields are exported as alphanumeric, date, or numeric user-defined fields. The values are exported, but they will not be recalculated after export.

- **Include notes** exports notes associated with the exported cases, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported cases, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported MXI or XML file to Unicode format, which is required for languages using more than one byte per character, such as Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

➤ To export customer service cases

1. In Maximizer, open the Customer Service window, and select the cases to export.

   – or –

   Don't select any entries to export all entries currently displayed in the Customer Service window.

2. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Customer Service Cases**.

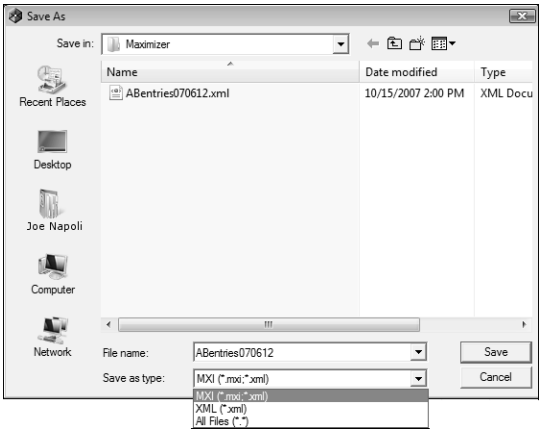
   The Export Customer Service Cases dialog box opens.

3. Click **Browse**.

   The Save As dialog box opens.

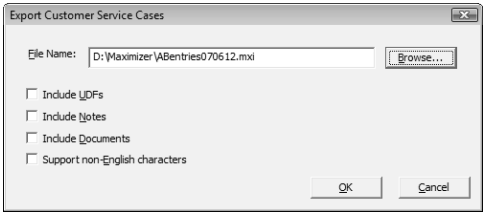
4. Specify the destination location and file name for the exported file.

5. From the **Save as** type drop-down list, select either **MXI** or **XML**.



6 Click **Save**.

7 Select any of the export options, as needed.



8 Click **OK**.

Exporting Knowledge Base Articles

You can export knowledge base articles to either MXI or XML format. The resulting file contains the content of the article itself, as well as additional information, such as file name, file extension, keywords, product, status, and creator.

➤ To export knowledge base articles

1 In Maximizer, open the Knowledge Base window.

2 In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Knowledge Base Articles**.

3 Specify the destination location and file name for the exported file.

4. From the **Save as type** drop-down list, select either **MXI** or **XML**.
5. Click **Save**.

Importing Address Book Data

Use Administrator or Maximizer to import Address Book information from other sources. Some import methods are available only through Administrator.

After importing Address Book entries into Maximizer, a list of imported Address Book entries is stored in a Favorite List named according to the file format and import date and time.

Maximizer provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **MXI or XML Files –** This method imports Address Book entries, customer service cases, knowledge base articles, and other data from MXI (Maximizer XML Interface) or XML Files. These MXI and XML files may have been created by exporting from Maximizer or by exporting the information from another source and converting it to XML using the Maximizer XML schema. For more information about the Maximizer XML Schema, refer to the *Maximizer CRM Administrator's Guide*.
- **Address Book Entries –** This method imports entries from a text file that is created when you export from another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts.
- **ACT! or GoldMine Database –** Importing an ACT! or GoldMine database is straightforward as Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. In Maximizer CRM Enterprise Edition, this import method is available through Administrator only. In Maximizer CRM Group Edition, this import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from ACT! or GoldMine, refer to the *Maximizer CRM Administrator's Guide*.
- **Other Contact Manager Database –** This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. or GoldMine database version and map the fields automatically. In Maximizer CRM Enterprise Edition, this import method is available through Administrator only. In Maximizer CRM Group

Edition, this import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from other contact manager databases, refer to the *Maximizer CRM Administrator's Guide*.

The following sections contain information on importing Address Book data into Maximizer:

- "Importing Address Book Entries" on page 430
- "About Two-Tier Imports" on page 432
- "Field Mapping" on page 432
- "Importing MXI and XML Files" on page 433
- "The MaxExchange Distribution Field and XML Import" on page 434
- "Importing Knowledge Base Articles" on page 435

Importing Address Book Entries

The Import Address Book Entries command enables you to perform a two-tier import. In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

If you import a Company record, and an existing Company record in the database has an identical value in the "Company" field, then the records are considered duplicates, and Maximizer will not import the duplicate Company record. However, Maximizer will import duplicate Individual and Contact records.

Note that user-defined fields containing more than one available item are not supported in a CSV (comma-separated values) import. Use the Advanced Import feature or MTI (Maximizer Transfer Interface) as an alternative.

Always back up the Address Book before importing.

➤ To import Address Book entries

1. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Address Book Entries**.

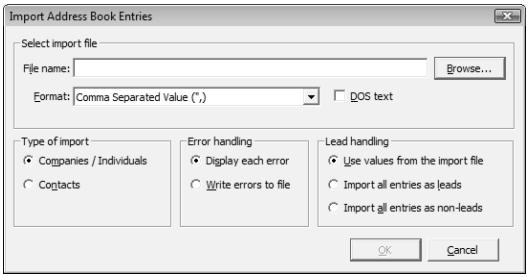
   The Import Address Book Entries dialog box opens.

2. Click **Browse** and locate the file to import.

3. Under **Type of import**, select the type of Address Book entries you want to create from the import—**Companies / Individuals** or **Contacts**.

   If you are performing a two-tier import, first select the Companies / Individuals. Then, after completing this procedure, repeat it a second time to import the Contacts.

4 Under **Lead handling**, select the appropriate option for importing records as lead or non-lead Address Book entries.



5 Click **OK**.

The Select Fields for Import dialog box opens.

6 Map the Maximizer fields with the fields in the file.

- In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file** column, and click **Add**.

  For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.
- To exclude a field from being imported into Maximizer, add **<Skip Field>** to the middle column for that field position.
- Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

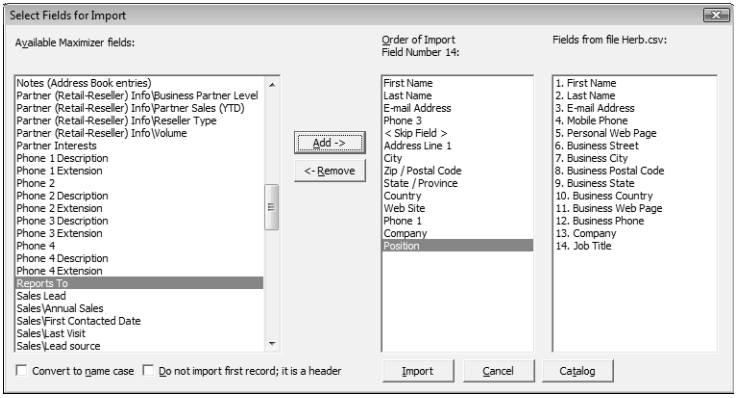
You can save the field mapping for reuse by clicking the Catalog button.

7 Specify the remaining settings for the import.

- To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** option.
- To exclude the first line from being imported, select the **Do not import first record; it is a header** option.

  Many comma-delimited data files use the first line as a column header.

8 Click **Import**.



About Two-Tier Imports

Many contact management programs keep two types of address book entries:

- Companies
- Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

- Companies/Individuals
- Contacts (associated with a Company or Individual)

In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

Two-tier importing is only applicable to comma-separated value (CSV) files, tab-delimited files, dBase III, III+, or IV, or XML files using the Import Address Book Entries command.

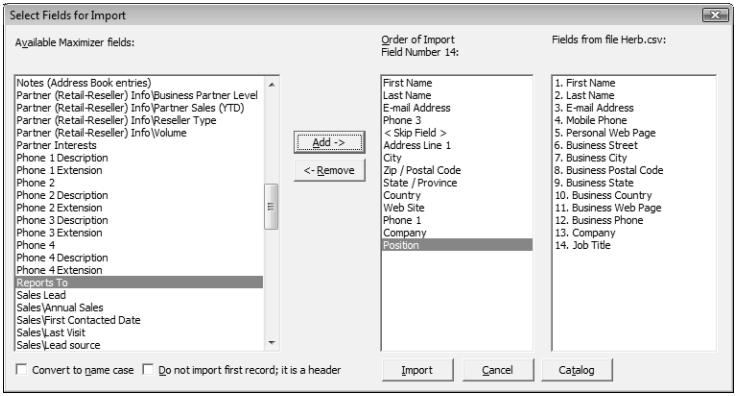
Field Mapping

When importing some types of data files, you need to map—create an association between—the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called "Company" in Microsoft Outlook and "Company or Individual" in Maximizer.

When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

When you are importing a file type that requires you to map fields, the Field Mapping dialog box opens where you can map Maximizer fields to fields in the source file. For each field in the source file, select one of the available Maximizer fields, and click Add to map the

fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select <Skip Field> from the list of Maximizer fields. When you have finished mapping the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column.



Importing MXI and XML Files

For more control over importing MXI files, or to import XML files, use the Advanced Import method described below, which enables you to specify a number of preferences about how to import the file.

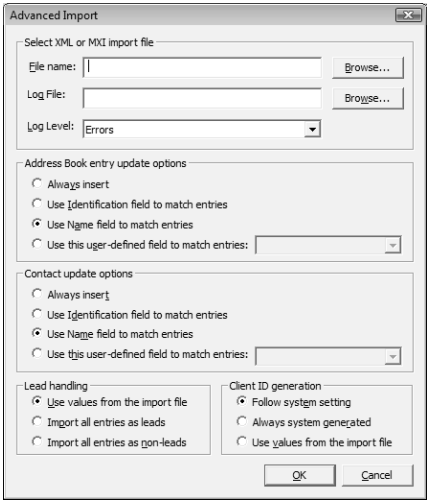
Note that customer service cases are always imported as separate records and are never merged with existing cases.

Always back up the Address Book before importing.

➤ To import from an MXI or XML file

1. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Advanced Import**.
2. Next to the **File name** field, click **Browse** and locate the .xml or .mxi file to import.

   Once you have selected the file to import, Maximizer fills in the Log File field automatically to create a log file with the same name and location as the import file.
3. To change the default Log File, click **Browse** and provide an alternate log file location and/or name.
4. In the **Log Level** drop-down list, specify how much detail to include in the log file.
5. Specify any additional import options.
6. Click **OK** to begin the import.



Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.

7 Click **OK** to close the message box.

The MaxExchange Distribution Field and XML Import

When importing the MaxExchange Distribution field from an XML file, if the destination Address Book hasn't created the field already, a version of this field will be created in the Address Book during the XML import, but it will not be the system MaxExchange Distribution field, and therefore will not work with the MaxExchange product.

If your XML file contains the MaxExchange Distribution field, please ensure that the destination Address Book has created the field already. (For information about creating the MaxExchange Distribution field, refer to the *Maximizer CRM Administrator's Guide*.) This measure will ensure proper MaxExchange distribution in the destination Address Book.

Also if the name of the MaxExchange Distribution field has been changed in the XML file, you must rename the field in the destination Address Book to match the name in the XML file before importing it.

Importing Knowledge Base Articles

To import knowledge base articles that have been exported from Maximizer in MXI or XML format, use the Import Knowledge Base Articles functionality in Maximizer.

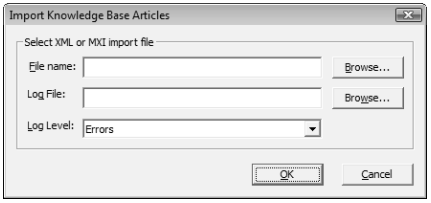
Note that knowledge base articles are always imported as separate records and are never merged with existing articles.

Always back up the Address Book before importing.

➤ To import a knowledge base article

1. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Knowledge Base Articles**.
2. Next to the **File name** field, click **Browse** and locate the .xml or .mxi file to import.

   Once you have selected the file to import, Maximizer fills in the Log File field automatically to create a log file with the same name and location as the import file.
3. To change the default log file, click **Browse** and provide an alternate log file location and/or name.
4. In the **Log Level** drop-down list, specify how much detail to include in the log file.
5. Click **OK** to begin the import.



   Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.
6. Click **OK** to close the message box.

Transferring Entries Between Address Books

Importing refers to copying data from an external database into a Maximizer Address Book. However, transferring refers to copying data between Maximizer Address Books. Transferring data is ideal for merging Address Books together and sharing entries and setups.

Encrypted user-defined fields cannot be transferred to another Address Book.

Transfer rights can be set on a per-user basis, although some field transfer options apply to all users.

You can transfer entries by direct access between Address Books or by email. Note that you should never use Maximizer Email Transfer (MET) between two MaxExchange-synchronized computers. Using MET and MaxExchange in combination adds records twice on the destination computer—once through MET, and again through MaxExchange.

The following sections contain information on transferring entries between different Address Books:

- "What happens During Transfers?" on page 436
- "Transferring Address Book Entries" on page 437
- "Transfer Summary Reports and Logging" on page 438

What happens During Transfers?

Once you start a transfer, Maximizer uses the following rules to determine which records to copy from the source Address Book into the target Address Book:

- **Address Book entry IDs –** If an Address Book entry ID number from the source Address Book does not exist in the target Address Book, the Address Book entry is inserted into the target Address Book.

Note that each Address Book entry has a unique ID.

- **Address Book entry names –** If the Address Book entry ID number from the source exists in the target Address Book, Maximizer compares the source and target Address Book entry names.

  If the names are different, Maximizer changes the ID number in the target Address Book and inserts the entry as a new Address Book entry.

  If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.

- **Date and Time –** Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book

that has been modified more recently than the data in the source Address Book.

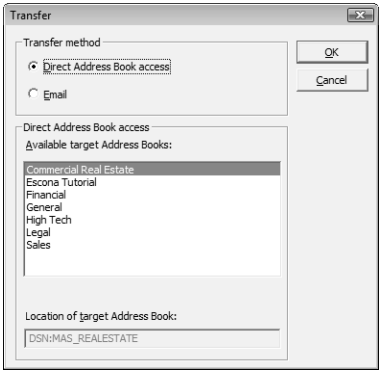
Transferring Address Book Entries

By default, when you transfer Companies or Individuals, the following are included—all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, orders (not available for SQL), and opportunities. Encrypted user-defined fields and customer service cases cannot be transferred.

➤ To transfer Address Book entries

1. In the Address Book window, select the entries you want to transfer.
2. In the top-left corner of the window, click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Address Book Entries**.
3. Select **Direct Address Book Access** or **Email** as the transfer method.

   If you are transferring your Address Book entries using direct Address Book access, select the target Address Book.



4. Click **OK**.

   The Login dialog box opens.
5. Type your user ID and password to log in to the target Address Book, and click **OK**.

   The Transfer Address Book Entries dialog box opens.
6. Select the transfer options.

For example, you can choose to include or not include user-defined fields, documents, notes, appointments, Hotlist tasks, orders, and simple opportunities (not using a strategy).

You can also click Advanced to set the advanced options, click the Advanced button.

7 Enter a note to be logged for each Address Book entry affected by the transfer if necessary.

8 Click **OK** to begin.

When Maximizer finishes, the Transfer Summary displays the results of the transfer.

If you are sending the data by email, Maximizer prepares the transfer file (with an .MET extension) as an email file attachment and displays the Compose Mail Message dialog box.

9 Enter the email address where you would like the transfer sent, and send the email.

Transfer Summary Reports and Logging

Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book, Maximizer can, optionally, add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

Enabling TAPI

Maximizer can use TAPI (Telephony Application Programming Interface) to detect incoming phone numbers (using caller ID) and log the phone conversation for the matching Address Book entry.

The following requirements must be met to use TAPI with Maximizer:

- Your telephone system must be TAPI-enabled.
- Your phone system's TAPI driver must be installed.
- Your computer's modem must be compatible with TAPI.

  You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.
- Maximizer must be configured for TAPI.

The following sections contain information on using TAPI with Maximizer:

- "Requirements for Caller ID" on page 439
- "Phone Number Matching with TAPI" on page 440
- "Configuring Maximizer to Use TAPI" on page 442

Requirements for Caller ID

Specific requirements are essential to implement caller ID detection:

- Caller ID service from the local telephone company.
- TAPI-compliant hardware that is Caller-ID capable.
- A TSPI component (such as an .INF file driver) for your Caller-ID enabled TAPI hardware (e.g., UniModemV)
- Microsoft TAPI software components.

Even if you meet these requirements, caller ID may not operate properly, especially if your local telephone company uses a different standard for caller ID than your TAPI driver. Call your local phone company to obtain more information regarding your caller ID standard and compare it to the standard used by the TAPI driver.

Reasons Why Caller ID May Not Work

If you use a TAPI-enabled modem (as opposed to a PBX, H.323, or other TAPI hardware), and your telephone company provide MESG-format caller ID information (rather than SDM, another common format), caller ID call detection is unlikely to work.

Microsoft's UniModemV TAPI driver and MODEM.INF file, provided with most TAPI modems, do not support MESG caller ID format, which means your modem (and Maximizer) may never receive caller ID information from TAPI. If your modem manufacturer provides its own TAPI modem or PBX driver and the appropriate INF file, or you are able to obtain SDM-format caller ID, you might have more success.

Phone Number Matching with TAPI

When Maximizer uses TAPI to detect an incoming phone call, it matches the phone call to a Maximizer Address Book entry and logs the call as a note for the entry. Depending on your TAPI configuration in Maximizer, it uses either the "Smart Phone Number Matching" or "Exact Phone Number Matching" algorithm to determine which Address Book entry matches the incoming phone number.

Smart Phone Number Matching

By default, Maximizer uses the Smart Phone Number Matching algorithm to determine which Address Book entry matches the incoming call.

When a call comes in, Smart Phone Number Matching looks for all Address Book entries with phone numbers ending with the incoming phone number string and displays those Address Book entries in a list so you can select the correct entry.

For example, if the incoming phone number string is four digits, Maximizer displays a list of all Address Book entries ending in those four digits.

Smart Phone Number Matching matches the digits from right to left. The number of matched digits required for matching is equal to the shorter length of the two phone numbers.

The following table illustrates Smart Phone Number Matching for four-digit and seven-digit incoming phone numbers.

Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
9-604-732-2314	Yes	Yes
1-604-732-2314	Yes	Yes
403-732-2314	Yes	Yes

Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
732-2314	Yes	Yes
497-2314	Yes	No
2314	Yes	Yes
3514	No	No
14	Yes	Yes

Exact Phone Number Matching

If you select the "Enable exact number matching" checkbox in the TAPI preferences in Maximizer, it uses the Exact Phone Number Matching algorithm instead of Smart Phone Number Matching. Exact Phone Number Matching considers an Address Book entry to match the incoming call only if both numbers contain exactly the same phone number with the specified number of digits.

By default, Exact Number Matching requires both phone numbers to be seven digits, but you can change the required number of digits.

The advantage of Exact Phone Number Matching is that when Maximizer finds an Address Book entry that matches exactly, you do not need to select it from a list of possible matches, as you do with Smart Phone Number Matching.

The following table illustrates Exact Phone Number Matching for four-digit and seven-digit incoming phone numbers.

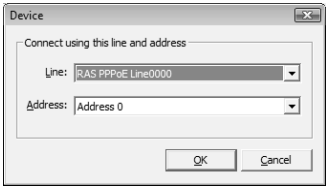
Address Book entry phone number	Does the incoming four-digit phone number (2314) match?	Does the incoming seven-digit phone number (732-2314) match?
9-604-732-2314	No	No
1-604-732-2314	No	No
403-732-2314	No	No
732-2314	No	Yes
497-2314	No	No
2314	Yes	No
3514	No	No
14	No	No

Configuring Maximizer to Use TAPI

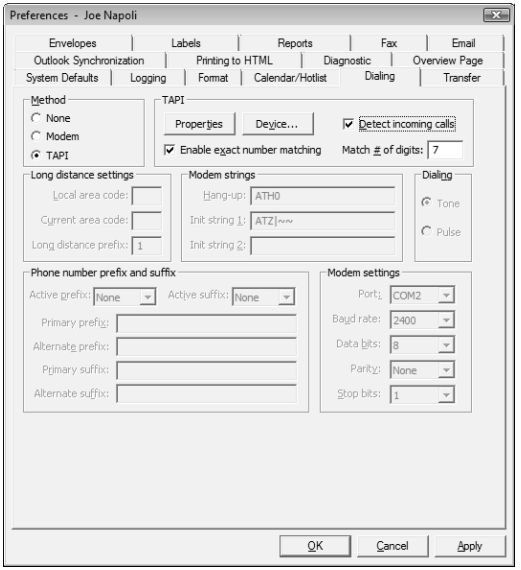
Before you can configure Maximizer to use TAPI, you must have a TAPI-enabled telephone system, and your computer's modem must be configured to use TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

➤ To configure Maximizer to use TAPI

1. On the **Setup** tab, select **Preferences**.
2. Select the **Dialing** tab.
3. Under **Method**, select **TAPI**.
4. Under **TAPI**, click **Properties**.
5. Fill in your location information, and click **OK** to return to the Dialing Preferences.
6. Click **Device**.



7. From the **Line** drop-down list, select the TAPI device name, and click **OK**.
8. Select the **Detect incoming calls** option.
9. If desired, select the **Enable exact number matching** option, and specify the number of phone number digits to match.



10 Click **OK** to close the Preferences dialog box.

Updating Maximizer with Live Update

The Maximizer Live Update Service is installed automatically with Maximizer CRM server and workstation. It enables users to download updates such as hot fixes and service releases, and you can configure Live Update to provide automatic notification of available updates.

The Live Update Wizard on Maximizer workstations connects to your Live Update Server and downloads any available updates.

After downloading the software updates, the downloaded executable file should launch immediately to start the installation. If you need to locate the downloaded file, it is in the user's Application Data folder (typically C:\Documents and Settings\<CurrentUser>\Application Data\Maximizer\Live Update).

The updates download folder path is specified in the Preferences tab of Live Update Manager.

If the Enable automatic Maximizer Live Update notification option is selected in the Live Update options in Administrator, a message box you when new updates are available. You can also check for updates at any time from Maximizer or Administrator.

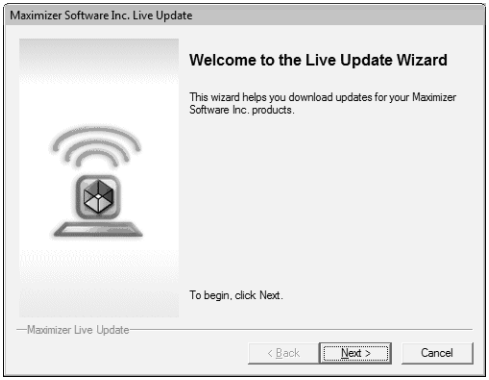
Live Update options iare accessible through the Live Update button on the System Options preferences in Administrator. (Select File > Preferences.)

➤ To download software updates from the server

1. If you are notified that new updates are available, click **OK** in the message box to start the Live Update Wizard.

   – or –

   In the top-left corner of the Maximizer window, click the **Maximizer** button, and select **Help**. Then, under **About Maximizer**, select **Maximizer Live Update**.


Maximizer Software Inc. Live Update
Welcome to the Live Update Wizard
This wizard helps you download updates for your Maximizer Software Inc. products.
To begin, click Next.
Maximizer Live Update
< Back
Next >
Cancel

2. Click **Next**.

   The Live Update Wizard connects to the Live Update Server to check for any available updates.

3. Select the update(s) to download.

4. Click **Next** to download the selected updates.
5. Click **Finish** to close the wizard.

Changing Languages for the Maximizer Spell Checker

In many of the Maximizer dialog boxes, you can use the Maximizer Spell Checker to check the spelling of text. By default, the selected language is American English, but you can change this language to any other of the following languages:

- Brazilian Portuguese
- British English
- Canadian French
- Spanish

➤ To change the language for the Spell Checker

1. Open the Maximizer Word Processor.
2. Select **Tools > Options**.
3. In the **Spelling** tab, choose a language from the **Currently installed languages** list.

APPENDIX A

Maximizer CRM 11 Ribbon Interface

Find the locations of commands in Maximizer CRM 11

In this chapter...

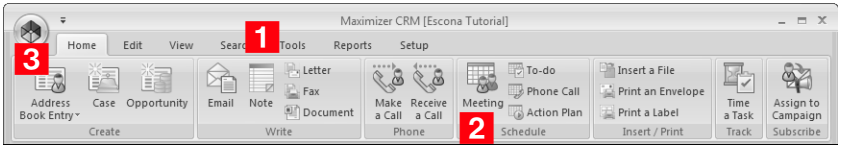
"The Maximizer CRM Ribbon Interface" on page 448
"Finding Commands in Maximizer CRM 11" on page 449
"Keyboard Shortcuts" on page 463

The Maximizer CRM Ribbon Interface

Maximizer CRM 11 has an improved interface where all commands are available on tabbed ribbons. In previous versions of Maximizer, the commands were available in menus and toolbars. This section lists the menu commands from the previous version of Maximizer CRM and the new locations of the commands in the Maximizer CRM 11 ribbon interface.

The following terms refer to elements in the Maximizer CRM 11 interface:

1. **Tabs –** The ribbons where commands are displayed. Tabs are displayed at the top of the Maximizer screen. The content of the tabs changes depending on the controlling or following window currently in focus.
2. **Groups –** The sections separating different commands within the tabs.
3. **Maximizer button –** The button in the top-left corner of the window. When you click the button, a menu containing additional commands is displayed.



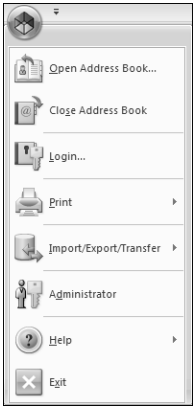
Finding Commands in Maximizer CRM 11

The following sections list the commands in Maximizer CRM 10.5 along with a description of how to find the commands in Maximizer CRM 11.

- "File Menu" on page 449
- "Edit Menu" on page 453
- "View Menu" on page 455
- "Search Menu" on page 456
- "Actions Menu" on page 458
- "Web Menu" on page 459
- "Tools Menu" on page 459
- "Reports Menu" on page 461
- "Window Menu" on page 461
- "Help Menu" on page 462

File Menu

You can access most commands from the File menu in Maximizer CRM 10.5 by clicking the Maximizer button in Maximizer CRM 11. You can also access commands on the Home and Setup tabs.



The following commands appear on the File menu in the Address Book window in Maximizer CRM 10.5.

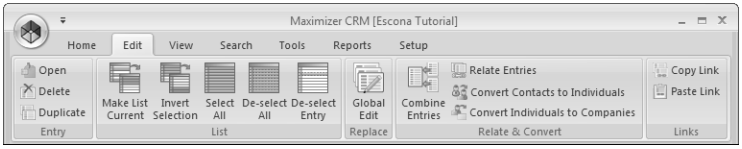
In Maximizer CRM 10.5, select File >	In Maximizer CRM 11
Open Address Book	Click the **Maximizer** button, and select **Open Address Book**.
Close Address Book	Click the **Maximizer** button, and select **Close Address Book**.
Login	Click the **Maximizer** button, and select **Login**.
Administrator	Click the **Maximizer** button, and select **Administrator**.
Page Setup	This command is unavailable in Maximizer CRM 11.
Print > Merge Documents	Click the **Maximizer** button, and select **Print > Merge Documents**.
Print > Envelopes	Click the **Maximizer** button, and select **Print > Envelopes**.
Print > Labels	Click the **Maximizer** button, and select **Print > Labels**.
Print > Column Report	Click the **Maximizer** button, and select **Print > Column Report**.
Print > Detailed Report	Click the **Maximizer** button, and select **Print > Detailed Report**.
Print > Name/Address/ Telephone Report	Click the **Maximizer** button, and select **Print > Name/Address/Telephone Report**.
Print > Note Report	Click the **Maximizer** button, and select **Print > Note Report**.
Print > Personal Organizer	Click the **Maximizer** button, and select **Print > Personal Organizer**.
Print > Custom Report	Click the **Maximizer** button, and select **Print > Custom Report**.
Send Email	On the **Home** tab, select **Email** from the **Write** group.
vCard > Import	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **vCard**, select **Import**.
vCard > Export	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **vCard**, select **Export**.
vCard > Send	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **vCard**, select **Send**.

In Maximizer CRM 10.5, select File >	**In Maximizer CRM 11**
Set Up User-Defined Fields	On the **Setup** tab, select **User-Defined Fields**.
Preferences	On the **Setup** tab, select **Preferences**.
Users	On the **Setup** tab, select **Manage Users** from the **User Management** group.
Security Groups and Teams	On the **Setup** tab, select **Security Groups** or **Teams** from the **User Management** group.
MaxMobile Administration	On the **Setup** tab, select **Administration** from the **MaxMobile** group.
Libraries > Strategy Library	On the **Setup** tab, select **Template Library > Strategy Library** from the **File Management** group.
Libraries > Action Plan Library	On the **Setup** tab, select **Template Library > Action Plan Library** from the **File Management** group.
Libraries > Automated Campaign Templates	On the **Setup** tab, select **Template Library > Automated Campaign Templates** from the **File Management** group.
Libraries > Traditional Campaign Templates	On the **Setup** tab, select **Template Library > Traditional Campaign Templates** from the **File Management** group.
Import > Address Book Entries	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Address Book Entries**.
Import > Knowledge Base Articles	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Knowledge Base Articles**.
Import > Advanced Import	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Advanced Import**.
Import > Vertical Templates	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Import**, select **Vertical Templates**.
Export > Address Book Entries	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Address Book Entries**.
Export > Customer Service Cases	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Customer Service Cases**.

In Maximizer CRM 10.5, select File >	In Maximizer CRM 11
Export > Knowledge Base Articles	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Export**, select **Knowledge Base Articles**.
Transfer > Address Book Entries	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Address Book Entries**.
Transfer > Column Setups	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Column Setups**.
Transfer > Document Templates	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Document Templates**.
Transfer > User-Defined Fields	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **User-Defined Fields**.
Transfer > Macros	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Macros**.
Transfer > Drop-Down Tables	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Drop-Down Tables**.
Transfer > Strategies	Click the **Maximizer** button, and select **Import/Export/Transfer**. Then, under **Transfer**, select **Strategies**.
Document Administration > Convert Embedded Documents	On the **Setup** tab, select **Document Administration > Convert Embedded Documents** from the **File Management** group.
Document Administration > Move Linked Documents	On the **Setup** tab, select **Document Administration> Move Linked Documents** from the **File Management** group.
Exit	Click the **Maximizer** button, and select **Exit**.

Edit Menu

You can access most commands from the Edit menu in Maximizer CRM 10.5 on the Edit tab in Maximizer CRM 11. You can also access commands on the Home and Setup tabs.



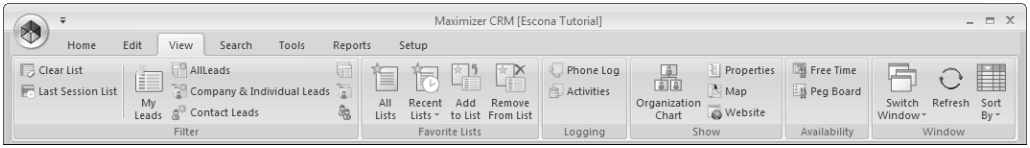
The following commands appear on the Edit menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select Edit >	**In Maximizer CRM 11**
Add > Company	On the **Home** tab, select **Address Book Entry > Company** from the **Create** group.
Add > New Company and New Contact	On the **Home** tab, select **Address Book Entry > New Company and New Contact** from the **Create** group.
Add > Individual	On the **Home** tab, select **Address Book Entry > Individual** from the **Create** group.
Add > Contact	On the **Home** tab, select **Address Book Entry > Contact** from the **Create** group.
Add > Company Lead	On the **Home** tab, select **Address Book Entry > Company Lead** from the **Create** group.
Add > New Company Lead and New Contact Lead	On the **Home** tab, select **Address Book Entry > New Company Lead and New Contact Lead** from the **Create** group.
Add > Individual Lead	On the **Home** tab, select **Address Book Entry > Individual Lead** from the **Create** group.
Add > Contact Lead	On the **Home** tab, select **Address Book Entry > Contact Lead** from the **Create** group.
Open [Address Book Entry]	On the **Edit** tab, select **Open** from the **Entry** group.
Delete Selected Entries	On the **Edit** tab, select **Delete** from the **Entry** group.
Global Edit	On the **Edit** tab, select **Global Edit** from the **Replace** group.

In Maximizer CRM 10.5, select Edit >	In Maximizer CRM 11
Create Duplicate Entry	On the **Edit** tab, select **Duplicate** from the **Entry** group.
Default Entry	On the **Setup** tab, select **Default Entry** from the **Default Entry** group.
Default Note	On the **Setup** tab, select **Default Note** from the **Default Entry** group.
Territory Management	On the **Setup** tab, select **Territory Management** from the **Territory** group.
Select Entry	On the **Edit** tab, select **Select Entry** from the **List** group
Select All	On the **Edit** tab, select **Select All** from the **List** group.
De-select All	On the **Edit** tab, select **De-select All** from the **List** group.
Invert Selection	On the **Edit** tab, select **Invert Selection** from the **List** group.
Make Selected List Current	On the **Edit** tab, select **Make List Current** from the **List** group.
Combine Selected Entries	On the **Edit** tab, select **Combine Entries** from the **Relate & Convert** group.
Relate Entries	On the **Edit** tab, select **Relate Entries** from the **Relate & Convert** group.
Convert Contacts to Individuals	On the **Edit** tab, select **Convert Contacts to Individuals** from the **Relate & Convert** group.
Convert Individuals to Companies	On the **Edit** tab, select **Convert Individuals to Companies** from the **Relate & Convert** group.
Insert File	On the **Home** tab, select **Insert a File** from the **Insert/Print** group.
Links	This command is unavailable in Maximizer CRM 11.
Copy Link	On the **Edit** tab, select **Copy Link** from the **Links** group.

View Menu

You can access most commands from the View menu in Maximizer CRM 10.5 on the View tab in Maximizer CRM 11.



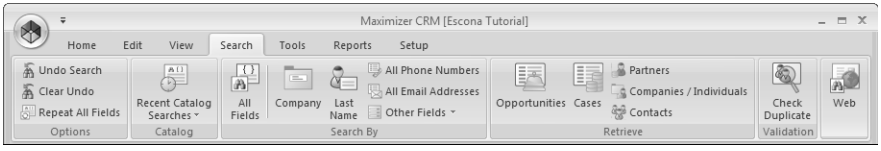
The following commands appear on the View menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select View >	**In Maximizer CRM 11**
My Leads	On the **View** tab, select **My Leads** from the **Filter** group.
Last Session List	On the **View** tab, select **Last Session List** from the **Filter** group.
Favorite Lists	On the **View** tab, select **All Lists** from the **Favorite Lists** group.
Recent Favorite Lists > Clear Recent Favorite Lists	On the **View** tab, select **Recent Lists > Clear Recent Favorite Lists** from the **Favorite Lists** group.
Recent Favorite Lists > [Favorite List]	On the **View** tab, select **Recent Lists** from the **Favorite Lists** group, and select a Favorite List.
Add to Favorite List	On the **View** tab, select **Add to List** from the **Favorite Lists** group.
Remove from Favorite List	On the **View** tab, select **Remove from List** from the **Favorite Lists** group.
Clear List	On the **View** tab, select **Clear List** from the **Filter** group.
Default Entries for All Users	On the **View** tab, select **Default Entries** from the **Filter** group.
Activities for [Address Book Entry]	On the **View** tab, select **Activities** from the **Logging** group.
Phone Log	On the **View** tab, select **Phone Log** from the **Logging** group.
Free Time	On the **View** tab, select **Free Time** from the **Availability** group.
Peg Board	On the **View** tab, select **Peg Board** from the **Availability** group.

In Maximizer CRM 10.5, select View >	In Maximizer CRM 11
Organizational Chart	On the **View** tab, select **Organization Chart** from the **Show** group.
Column Setup	On the **Setup** tab, select **Column Setup** from the **Display** group.
Toolbars	This command is unavailable in Maximizer CRM 11.
Sort by > [Column]	On the **View** tab, select **Sort By** from the **Window** group, and select a column.
Properties	On the **View** tab, select **Properties** from the **Show** group.
Refresh	On the **View** tab, select **Refresh** from the **Window** group.

Search Menu

You can access all commands from the Search menu in Maximizer CRM 10.5 on the Search tab in Maximizer CRM 11.



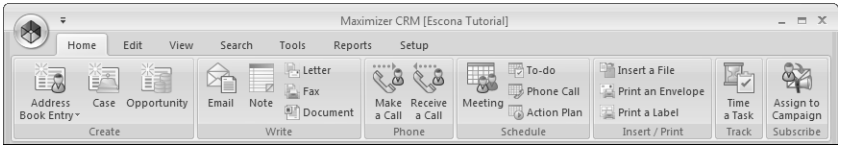
The following commands appear on the Search menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select Search >	In Maximizer CRM 11
Undo Search	On the **Search** tab, select **Undo Search** from the **Options** group.
Clear Undo	On the **Search** tab, select **Clear Undo** from the **Options** group.
Repeat All Fields	On the **Search** tab, select **Repeat All Fields** from the **Options** group.
Last Catalog Searches > [Catalog Search]	On the **Search** tab, select **Recent Catalog Searches** from the **Catalog** group, and select a saved search.
Last Catalog Search > Reset Last Searches	On the **Search** tab, select **Recent Catalog Searches > Reset Last Searches** from the **Catalog** group.

In Maximizer CRM 10.5, select Search >	**In Maximizer CRM 11**
All Fields	On the **Search** tab, select **All Fields** from the **Search By** group.
Last Name	On the **Search** tab, select **Last Name** from the **Search By** group.
First Name	On the **Search** tab, select **Other Fields > First Name** from the **Search By** group.
Company	On the **Search** tab, select **Company** from the **Search By** group.
All Email Addresses	On the **Search** tab, select **All Email Addresses** from the **Search By** group.
City/Town	On the **Search** tab, select **Other Fields > City/Town** from the **Search By** group.
State/County/Province	On the **Search** tab, select **Other Fields > State/County/Province** from the **Search By** group.
Zip/Postcode	On the **Search** tab, select **Other Fields > Zip/Postcode** from the **Search By** group.
IDentification	On the **Search** tab, select **Other Fields > IDentification** from the **Search By** group.
All Phone Numbers	On the **Search** tab, select **All Phone Numbers** from the **Search By** group.
Notes	On the **Search** tab, select **Other Fields > Notes** from the **Search By** group.
Documents	On the **Search** tab, select **Other Fields > Documents** from the **Search By** group.
Other > [Field]	On the **Search** tab, select **Other Fields** from the **Search By** group.
Retrieve Contacts	On the **Search** tab, select **Contacts** from the **Retrieve** group.
Retrieve Companies/ Individuals	On the **Search** tab, select **Companies/ Individuals** from the **Retrieve** group.
Retrieve Partners	On the **Search** tab, select **Partners** from the **Retrieve** group.
Retrieve Opportunities	On the **Search** tab, select **Opportunities** from the **Retrieve** group.
Retrieve Customer Service Cases	On the **Search** tab, select **Cases** from the **Retrieve** group.
Check [Column Name] Column for Duplicates	On the **Search** tab, select **Check Duplicate** from the **Validation** group.

Actions Menu

You can access all commands from the Actions menu in Maximizer CRM 10.5 on the Home tab in Maximizer CRM 11.



The following commands appear on the Actions menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select Actions >	**In Maximizer CRM 11**
Create a Customer Service Case	On the **Home** tab, select **Case** from the **Create** group.
Create an Opportunity	On the **Home** tab, select **Opportunity** from the **Create** group.
Make a Call	On the **Home** tab, select **Make a Call** from the **Phone** group.
Receive a Call	On the **Home** tab, select **Receive a Call** from the **Phone** group.
Time a Task	On the **Home** tab, select **Time a Task** from the **Track** group.
Schedule a Meeting	On the **Home** tab, select **Meeting** from the **Schedule** group.
Schedule a To-do	On the **Home** tab, select **To-do** from the **Schedule** group.
Schedule a Call	On the **Home** tab, select **Phone Call** from the **Schedule** group.
Schedule an Action Plan	On the **Home** tab, select **Action Plan** from the **Schedule** group.
Write an Email	On the **Home** tab, select **Email** from the **Write** group.
Write a Note	On the **Home** tab, select **Note** from the **Write** group.
Write a Letter	On the **Home** tab, select **Letter** from the **Write** group.
Write a Fax	On the **Home** tab, select **Fax** from the **Write** group.
Write a Document	On the **Home** tab, select **Document** from the **Write** group.

In Maximizer CRM 10.5, select Actions >	In Maximizer CRM 11
Print an Envelope	On the **Home** tab, select **Print an Envelope** from the **Insert/Print** group.
Print a Label	On the **Home** tab, select **Print a Label** from the **Insert/Print** group.

Web Menu

You can access commands from the Web menu in Maximizer CRM 10.5 on the View, Search, and Tools tabs in Maximizer CRM 11.

The following commands appear on the Web menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select Web >	In Maximizer CRM 11
Draw a Map for [Address Book Entry]	On the **View** tab, select **Map** from the **Show** group.
Search for [Address Book Entry]	On the **Search** tab, select **Web**.
View Website for [Address Book Entry]	On the **View** tab, select **Website** from the **Show** group.
Create Web Form	On the **Tools** tab, select **Web Form** from the **Internet** group.
Mailing Lists	On the **Tools** tab, select **Mailing Lists** from the **Internet** group.
Visit Maximizer	This command is unavailable in Maximizer CRM 11.

Tools Menu

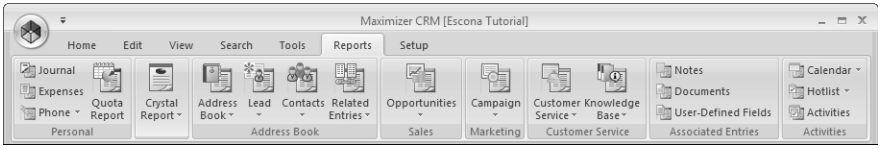
You can access most commands from the Tools menu in Maximizer CRM 10.5 on the Tools tab in Maximizer CRM 11.

The following commands appear on the Tools menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select Tools >	In Maximizer CRM 11
Phone	On the **Tools** tab, select **Phone** from the **Other** group.
Timer	On the **Tools** tab, select **Timer** from the **Other** group.
Graphing	On the **Tools** tab, select **Graphing** from the **Other** group.
Maximizer Word Processor	On the **Tools** tab, select **Maximizer Editor** from the **Other** group.
Maximizer Wizards	On the **Tools** tab, select **Maximizer Wizard** from the **Other** group.
World Clock	On the **Tools** tab, select **World Clock** from the **Other** group.
Record Macro	On the **Tools** tab, select **Record Macro** from the **Macro** group.
Run Last Macro	On the **Tools** tab, select **Run Last Macro** from the **Macro** group.
Macro List	On the **Tools** tab, select **Macro List** from the **Macro** group.
Synchronize with Outlook	On the **Tools** tab, select **Synchronize with Outlook** from the **Office** group.
Synchronize with MaxMobile	This command is unavailable in Maximizer CRM 11.
Reset MaxMobile	This command is unavailable in Maximizer CRM 11.
Export to Excel	On the **Tools** tab, select **Export to Excel** from the **Office** group.
Advanced Export to Excel	On the **Tools** tab, select **Advanced Export to Excel** from the **Office** group.
Open Microsoft Word	On the **Tools** tab, select **Open Microsoft Word** from the **Office** group.
Expert Advice	This command is unavailable in Maximizer CRM 11.

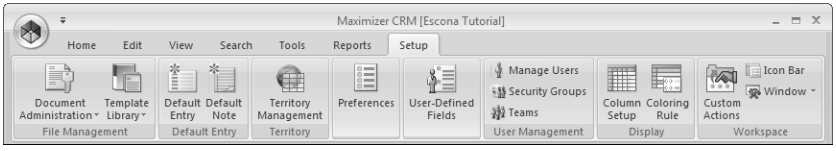
Reports Menu

You can access all commands from the Reports menu in Maximizer CRM 10.5 on the Reports tab in Maximizer CRM 11.



Window Menu

You can access the commands from the Window menu in Maximizer CRM 10.5 on the Setup and View tabs in Maximizer CRM 11.



The following commands appear on the Window menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select Window >	**In Maximizer CRM 11**
Window Settings > Window Layout > [Layout]	On the **Setup** tab, select **Window > Window Settings** from the **Workspace** group, and select a layout.
Window Settings > Favorite Layouts	On the **Setup** tab, select **Window > Window Settings > Favorite Layouts** from the **Workspace** group.
Window Settings > Save Settings on Exit	On the **Setup** tab, select **Window > Window Settings > Save Settings on Exit** from the **Workspace** group.
Window Settings > Reset Default Layout	On the **Setup** tab, select **Window > Window Settings > Reset Default Layout** from the **Workspace** group.
Window Settings > Set Color > Current Window	On the **Setup** tab, select **Window > Window Settings > Set Color > Current Window** from the **Workspace** group.
Window Settings > Set Color > All Windows	On the **Setup** tab, select **Window > Window Settings > Set Color > All Windows** from the **Workspace** group.

In Maximizer CRM 10.5, select Window >	In Maximizer CRM 11
Window Settings > Set Font > Current Window	On the **Setup** tab, select **Window > Window Settings > Set Font > Current Window** from the **Workspace** group.
Window Settings > Set Font > All Windows	On the **Setup** tab, select **Window > Window Settings > Set Font > All Windows** from the **Workspace** group.
Window Management > [Option]	On the **Setup** tab, select **Window > Window Management** from the **Workspace** group, and select an option.
[Window]	On the **View** tab, select **Switch Window** from the **Window** group, and select a window.

Help Menu

You can access all commands from the Help menu in Maximizer CRM 10.5 by clicking the Maximizer button in Maximizer CRM 11.

The following commands appear on the Help menu in the Address Book window in Maximizer CRM 10.5.

In Maximizer CRM 10.5, select Help >	In Maximizer CRM 11
Contents	Click the **Maximizer** button, and select **Help > Local Contents** or **Online Contents**.
Online Support	Click the **Maximizer** button, and select **Help > Online Support**.
Getting Started	Click the **Maximizer** button, and select **Help > Getting Started**.
MaxMobile User's Guide	Click the **Maximizer** button, and select **Help > MaxMobile User's Guide**.
Other Products > [Product]	Click the **Maximizer** button, and select **Help > Other Maximizer Products**.
Training	Click the **Maximizer** button, and select **Help > Training**.
About Maximizer CRM	Click the **Maximizer** button, and select **Help > About Maximizer CRM**.
Maximizer Live Update	Click the **Maximizer** button, and select **Help > Maximizer Live Update**.

Keyboard Shortcuts

Sometimes you will find it faster to use keyboard shortcuts instead of using your mouse. Keyboard shortcuts are available to change the focus of windows, to select commands from ribbons, to work with entries in lists, and to work in many other areas of the interface.

The following sections list the keyboard shortcuts available in Maximizer:

- "Keyboard Shortcuts: Windows" on page 463
- "Keyboard Shortcuts: Ribbons" on page 464
- "Keyboard Shortcuts: Dialog Boxes" on page 465
- "Keyboard Shortcuts: Entries" on page 465
- "Keyboard Shortcuts: Drop-Down Calendars" on page 465
- "Keyboard Shortcuts: Notes" on page 466
- "Keyboard Shortcuts: Phone Calls" on page 466
- "Keyboard Shortcuts: Macros" on page 467
- "Keyboard Shortcuts: Other Tasks" on page 467

Keyboard Shortcuts: Windows

The following keyboard shortcuts apply to Maximizer windows.

Press	To
Alt+spacebar, n	Minimize Maximizer.
Alt+spacebar, x	Maximize Maximizer.
Alt+-(hyphen),n	Minimize the current window.
Alt+-(hyphen), x	Maximize the current window.
Alt+-(hyphen), r	Restore the current window.
Ctrl+1	Open the Address Book window.
Ctrl+2	Open the Contacts window.
Ctrl+3	Open the User-Defined Fields following window.
Ctrl+4	Open the Notes following window.
Ctrl+5	Open the Documents following window.
Ctrl+6	Open the Hotlist window.
Ctrl+7	Open the Calendar window.
Ctrl+8	Open the Journal window.
Ctrl+9	Open the Expenses window.
Ctrl+0	Open the Opportunities window.

Press	To
Ctrl+A	Open the Opportunities following window.
Ctrl+D	Open the My Work Day window.
Ctrl+E	Open the Email window.
Ctrl+H	Open the Customer Service window.
Ctrl+K	Open the Knowledge Base window.
Ctrl+L	Open the Company Library window.
Ctrl+M	Open the Campaigns window.
Ctrl+P	Open the Automated Campaigns following window.
Ctrl+R	Open the Related Entries following window.
Ctrl+Q	Stop searching or list building.
Ctrl+S	Open the Customer Service following window.
Ctrl+T	Open the Quotas window.
Ctrl+F4	Close the current window.
Ctrl+F9	Open the Activities dialog box.
Ctrl+Tab	Move between open windows.
Ctrl+Shift+F	Move the focus to the View bar.
Shift+F4	Tile all windows vertically.
Shift+F5	Cascade all windows.
Shift+F6	Tile all windows horizontally.
Tab	Sort by next column.
Esc	Move the focus back to the window from a tab or drop-down list.

Keyboard Shortcuts: Ribbons

The following keyboard shortcuts apply to selecting tabs and commands in the ribbon interface.

Press	To
Alt+*highlighted letter*	Select a tab.
highlighted letter	Select a command from the current tab.
Esc	Select a different tab.
Shift+F10	Access the shortcut menu.

Keyboard Shortcuts: Dialog Boxes

The following keyboard shortcuts apply to working in dialog boxes.

Press	To
Tab	Move to the next field or button.
Shift+Tab	Move to the previous field or button.
Enter	Close the dialog box and accept entries in the dialog box.
Shift+F10	Access the shortcut menu on edit fields.
Esc	Close the dialog box and optionally save changes.

Keyboard Shortcuts: Entries

The following entries apply to working with entries in a list.

Press	To
Home	Go to the first entry in the list.
End	Go to the last entry in the list.
Insert	Add an entry.
Enter	Open the current entry.
Delete	Delete the current entry.
Ctrl+spacebar	Select the current entry
Ctrl+/ (forward slash)	Select all entries.
Ctrl+\ (back slash)	Clear selection of all entries.
Ctrl+= (equal symbol)	Invert which entries are selected.
Shift+Down Arrow	Drag and select entries.
Alt+Enter	Show the properties of the selected entry.

Keyboard Shortcuts: Drop-Down Calendars

The following keyboard shortcuts apply to drop-down calendars that are available when you select a date.

Press	To
Down Arrow	Move ahead one week.
Up Arrow	Move back one week.
Page Down	Move ahead one month.
Page Up	Move back one month.

Press	To
Ctrl+Page Down	Move ahead one year.
Ctrl+Page Up	Move back one year.

Keyboard Shortcuts: Notes

The following keyboard shortcuts apply to notes, including Journal notes.

Press	To
Right Arrow	Move right one character.
Left Arrow	Move left one character.
Up Arrow	Move up one line.
Down Arrow	Move down one line.
Home	Jump to the start of the line.
End	Jump to the end of the line.
Ctrl+Home	Jump to the top of the document.
Ctrl+End	Jump to the bottom of the document.
Page Up	Move up one screen.
Page Down	Move down one screen.

Keyboard Shortcuts: Phone Calls

The following keyboard shortcuts apply to using the phone call features.

Press	To
F7	Phone the current entry.
Shift+F7	Use the quick dial feature to phone the main phone number for the current entry.
Ctrl+F7	View the phone log.
Alt+F7	Receive a phone call.

Keyboard Shortcuts: Macros

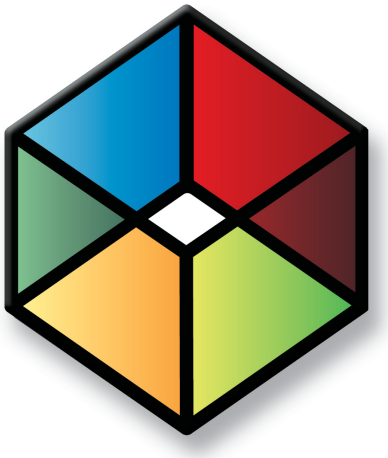
The following keyboard shortcuts apply to working with macros.

Press	To
F11	Record a macro.
Shift+F11	Run the last macro.
Ctrl+F11	View the list of macros.

Keyboard Shortcuts: Other Tasks

The following keyboard shortcuts apply to any other tasks in Maximizer.

Press	To
F1	View help for the current window or dialog box.
F8	Open the Maximizer Word Processor.
Shift+F9	Use the Timer.
Ctrl+W	Use a Maximizer Wizard.
Ctrl+Z	Undo the last search.
Alt+F4	Exit Maximizer.



APPENDIX B

Crystal Reports Database Views/Tables Reference

Maximizer Database Views/Tables Reference

In this chapter...

"Overview" on page 470
"Data Population for the Current Window" on page 470
"Database Views for User-Defined Fields" on page 471
"Database Driver Used to Create Crystal Reports" on page 471
"Filtering Data" on page 472
"Linking" on page 473
"Controlling Windows" on page 473
"Including Additional Views in Your Reports" on page 474
"SQL Views and Data Tables" on page 477

Overview

This chapter is a technical reference for using Crystal Reports with Maximizer data. For information on Maximizer SQL views and tables, refer to the Customization Suite documentation.

Data Population for the Current Window

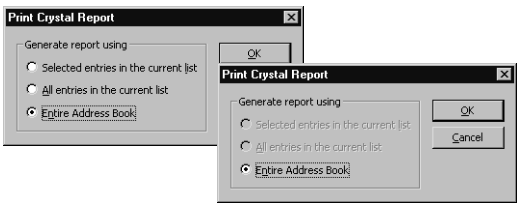
For more information on user access rights for creating Crystal Reports, see the *Maximizer CRM Administrator's Guide*.

When you create a new report template or edit an existing report template, the default table/view for the report is based on the current Maximizer window. You are connected to the **MAS_[Address Book name] for Microsoft SQL** data source by default. If you want to link to additional tables, you must do so in the **Database Expert** dialog box in Crystal Reports. See "Linking" on page 473 for more information.

Following is a list of each controlling window and its associated default table and file names used for Crystal Reports.

Controlling Window	Views for Microsoft SQL
Address Book	AMGR_Client
Opportunity	Opp_View
Campaigns	AMGR_Opportunity
Hotlist	AMGR_Hotlist
Customer Service	CSCases_View

If you are not in the controlling window that corresponds with the type of report you choose, you are limited to running the report on all entries in the Address Book rather than a selected or current entry list.



Database Views for User-Defined Fields

When you create a user-defined field, a database view for that user-defined field is also created. You can use these views to report on user-defined fields in Crystal Reports. For example, when a new Address Book user-defined field called "Salary" is created, a new view named "A_Salary" is dynamically created. Based on the type of user-defined field, the view name is prefixed by a designated letter. The following table identifies the view name prefixes for each type of user-defined field.

Microsoft SQL View Prefixes

The Microsoft SQL driver creates database views for user-defined fields, using the following prefixes.

Prefix	Type of user-defined field
A_	Address Book
BP_	Third-Party Integration
C_	Campaign
CS_	Customer Service
O_	Opportunity
U_	Users
S_	System

Database Driver Used to Create Crystal Reports

Maximizer uses the native SQL Server driver (MAS_ DSN) exclusively to create Crystal Reports in this version of the software. However, Crystal Reports created in some previous versions of Maximizer were created using the Maximizer ODBC driver.

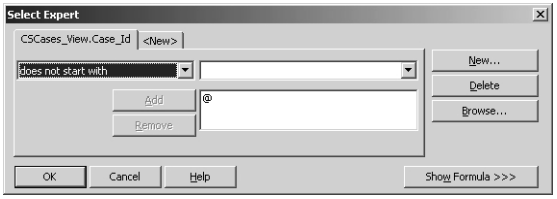
The Maximizer ODBC driver is still supported for compatibility reasons with previous versions of Maximizer. If you are creating new reports for use with Maximizer, use the SQL Server driver.

Filtering Data

In order to report on particular types of data, you need to use selections or filtering in Crystal Reports. Use the Select Expert (Report > Select Expert) to select or filter data for your report. In the case of the Address Book table/view, use the Record_Type field to select or filter Address Book entries. For example, to create a report that only shows Company records, use the Select Expert to return only those records where "Record_Type = 1".

You can also filter or select the data for the report using Maximizer. Once a report has been saved, populate the appropriate Maximizer windows with the desired information then run the personal report and select the all entries in the current list option.

Maximizer contains default records in many of the common modules. These are denoted by an "@" sign and can be filtered using the Select Expert by using the "does not start with" criteria as illustrated in the following graphic.

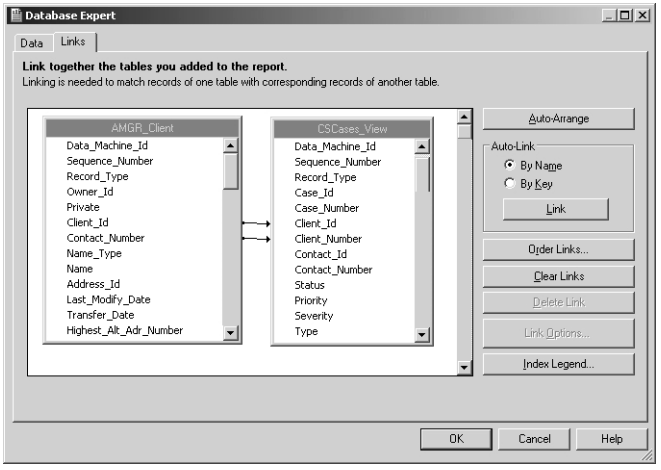


Address Book Entry Data Type	Record Type for Microsoft SQL
Company	Record_Type = 1
Individual	Record_Type = 2
Contact	Record_Type = 31
Individual Contact	Record_Type = 32
Default Entry	Record_Type = 5
Alternate Address for Contact	Record_Type = 41
Alternate Address for Individual	Record Type = 42

Linking

Linking determines how the report data elements are related. For example, to report all notes related to an Address Book Entry you would link the Client_Id and Contact_Number fields of the AMGR_Client view to the fields of the same name in Notes.

Crystal Reports enables you to specify the type of join and type of link you want to use when linking tables. Joins and links indicates how linked fields in two tables are compared when records are read. Join, enforce, and link options can be specified in the Links Options dialog box. Using the various join enforcement options can ensure that linked tables are included in the SQL query, even when none of the fields in the table are used in the report. The Crystal Reports help files contain more information on Linking options.



Controlling Windows

As mentioned previously, when you choose to create a new report template or edit an existing template, the default view for the report is based on the active controlling window. Following is an example of a controlling window in Maximizer outlining the associated view name, links, and common selections.

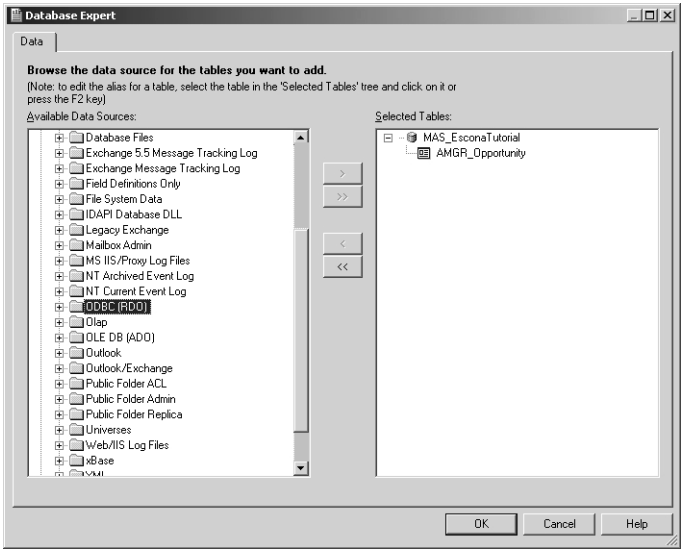
Customer Service Window Example

Each customer service case created for an Address Book entry is a record in the CSCases_View view. To report on cases for Address Book entries, you must add the view and link it to the Address Book entry table according to the following table.

Case	Microsoft SQL	Maximizer ODBC
Case view name	CSCases_View	CSCases
Links	Client_Id => Client_Id Contact_Number => Client_Number	Client_Id => Client_Id Contact_Number => Client_Number

Including Additional Views in Your Reports

To include additional views in your reports, you must link them to the parent table of the controlling window. You do so through the Database Expert (Database > Database Expert) by linking to the data source.

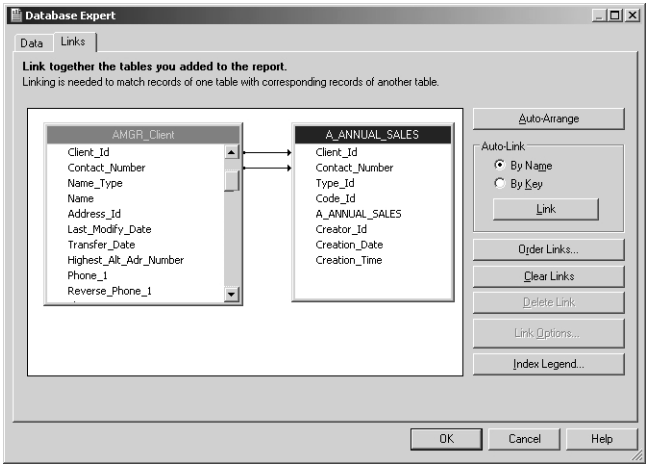


User-Defined Fields Example

When a new User-Defined Field is created, a new database table or view for that User-Defined Field is also created. User-Defined Fields can be associated with Address Book, Campaign, Opportunity, Customer Service, and Users. Use the Database Expert (Database > Database Expert) to include a user-defined field and link it to the desired parent view/table.

The following example is using a user-defined field named “Annual Sales”.

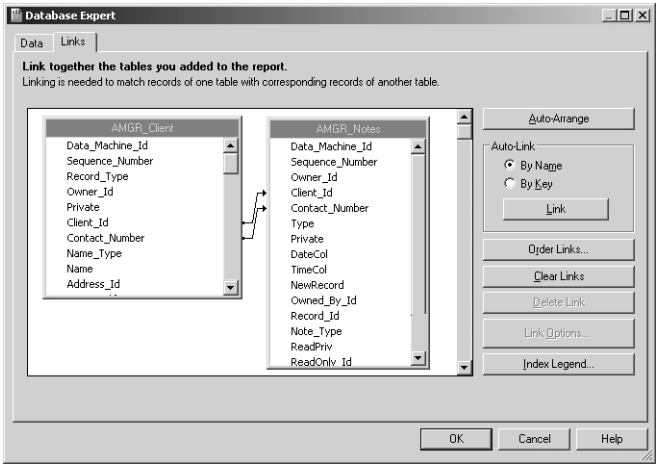
User-Defined Field	Microsoft SQL	Maximizer ODBC
User-defined field view name	A_<user-defined field name> example: A_ANNUAL_SALES	U_<user-defined field name> example: U_ANNUAL_SALES
Links	Client_Id => Client_Id Contact_Number => Contact_Number	Client_Id => Client_Id Contact_Number => Contact_Number



Notes Example

Each note created for an Address Book entry is a record in the view called Notes. To report on notes associated with Address Book entries, you must add the view and link it to the Address Book entry table according to the following table.

Note	**Microsoft SQL**
Notes view name	AMGR_Notes
Links	Client_Id => Client_Id Contact_Number => Contact_Number



SQL Views and Data Tables

Following is an appendix of the most common Maximizer SQL views and tables.

AMGR_Client View

The AMGR_Client View contains name, address, phone number, and email address information for Address Book entries, including Companies, Individuals, and Contacts, as well as alternate addresses and default entries. Many other tables in the database reference the Client_Id and Contact_Number fields of this table.

Note
This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Type of Address Book entry: 1 = Company 2 = Individual 5 = Default entries 31 = Company Contact 32 = Individual Contact 41 = Company or Company Contact alternate address 42 = Individual or Individual Contact alternate address
Owner_Id	String	11		
Private	Integer	4		
Client_Id	String	23		Unique client identification string.
Contact_Number	Integer	4		Unique client identification number. 0 = Company or Individual record < 60,000 = Contact record > 59,999 = Alternate address
Name_Type	String	1		C = Company I = Individual, Contact, Default entry, or Alternate address

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Name	String	79		One of the following: • Company name • Individual last name • Contact last name • Alternate address description • Default Entry
Address_Id	Integer	4		0 = Use default address Value other than 0 = Contact_ Number of address to use for this Address Book entry.
Last_Modify_Date	DateTime	8		
Transfer_Date	DateTime	8		Date and time when the last transfer occurred.
Highest_Alt_Adr_ Number	Integer	4		Highest alternate address number in use.
Phone_1	String	21		
Reverse_Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_2	String	21		
Reverse_Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_3	String	21		
Reverse_Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_4	String	21		
Reverse_Phone_4	String	21		
Phone_4_Extension	String	21		
Highest_Contact_ No	Integer	4		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Receives_Letters	Integer	4		Indicates whether Contact (Record_Type = 31 or 32) receives mail sent to the Company/ Individual: 0 = Contact doesn't receive mail sent to Company/Individual 1 = Contact receives mail sent to Company/Individual **Note:** • For Individual records (Record_Type = 2), this value is always 1. • For Company records (Record_Type = 1) and alternate addresses (Record_Type = 41 or 42), this value is always 0.
Use_Client_Name	Integer	4		Applies to Contacts (Record_Type = 31 or 32) only. Indicates whether the Contact's Company/Individual name should be included in the address: 0 = Do not include Company/ Individual name in address 1 = Include Company/Individual name in address
First_Name	String	79		
Initial	String	79		Middle name or initials.
MrMs	String	79		
Title	String	79		
Salutation	String	79		
Department	String	79		
Firm	String	79		The Company Name of an Individual record. Applies to Individual (Record_Type = 2) records only.
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Client_Id	String	23		Last Client ID used for transfer.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Updated_By_Id	String	11	ADMN_User_ Details.User_Id	User_Id of user who most recently updated the Address Book entry.
Reports_To_ Contact_Number	Integer	4	AMGR_Client. Contact_Number	Contact_Number of Contact (Record_Type = 31 or 32) to whom this contact reports (e.g., contact's supervisor or manager). Applies only to Contact records (Record_ Type = 31 or 32).
Assigned_To	String	11	ADMN_User_ Details.User_Id	User_Id of user assigned to the Address Book entry as the Account Manager. Applies to Company (Record_Type = 1), Individual (Record_Type = 2), and Default Entry (Record_Type = 5) records only.
ReadPriv	Integer	2		
ReadOnly_Id	String	11		
Phone_1_Desc	String	21		
Phone_2_Desc	String	21		
Phone_3_Desc	String	21		
Phone_4_Desc	String	21		
Email_1_Desc	String	15		
Email_2_Desc	String	15		
Email_3_Desc	String	15		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Lead_Status	Integer	2		0 = Not a sales lead 1 = Sales lead Applies to Company (Record_Type = 1) and Individual (Record_Type = 2) records only.
Change_Bits	Binary	8		MaxMerge Change Field. Used by Maximizer.
Contact_Inherits_ UDFs	Integer	2		"New contact inherits user-defined fields" checkbox in Company and Individual Address Book entries. 0 = Contact does not inherit UDFs 1 = Contact inherits UDFs
Territory_Status	Integer	2		Indicates how the territory was set. 0 = Unassigned 1 = Unaligned 101 = Set by user 102 = Set by rule 201 = Set by manager **Note:** Unaligned status is used when territory alignment moves an Address Book entry from a defined territory so that it no longer falls under any of the territory criteria. The old territory remains in the Territory_ID field.
Territory_ID	Numeric	10	AMGR_Territory. Territory_ID	Unique identification number.

Company View

The Company View includes fields from AMGR_Client for Company Address Book entries.

Note
This view is read-only.

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record identifier.
Owner_Id	String	11		
Private	Integer	2		If modified, all contacts and addresses with the same Client_Id will also be modified.
Client_Id	String	23		Unique identification number. System generated if field is Null and "System to assign Address Book entries' Identification field values" option is selected in Administrator (File > Preferences > System Options). Must be unique. Non-modifiable.
Contact_Number	Integer	2		Always 0
Name_Type	String	1		Always C
Company_Name	String	79		Name of Company. Mandatory field.
Address_Id	Integer	2	AMGR_Client. (Client_Id, Address_Id)	Points to the address to use. 0 to use main address or must already exist in the Address table. >= 60000 means unsigned.
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer. If left empty, it defaults to the system clock.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer. Do not use.
Change_Bits_High	Binary	8		MaxMerge Change Field 2. Used by Maximizer. Do not use.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time when Company/ Individual record was created. Default value is current system date and time.
Creation_Time	DateTime	11		

People View

The People view includes fields from AMGR_Client for Individual and Contact entries.

Note
This view is read-only.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record type indicator.
Owner_Id	String	11		
Private	Integer	2		
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Unique identification number. Valid values: 0–59999 • 0 = Individual • Value other than 0 = Contact Cannot modify. Pair (Client_Id, Contact_Number) must be unique.
Contact_Number	Integer	2		
Name_Type	String	1		
Last_Name	String	79		
Address_Id	Integer	2	AMGR_Client. (Client_Id, Address_Id)	Pointer to address record to use: • 0 = Use main address • >= 60,000 (unsigned) = Use alternate address
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Receives_Letters	Integer	2		Applies to Contacts only. 0 = Contact does not receive mail 1 = Contact receives mail (default)
Use_Client_Name	Integer	2		Applies to Contacts only. 0 = Do not include Company/ Individual name in mailing address 1 = (Default) Include Company/ Individual name in mailing address
First_Name	String	79		
Initial	String	79		
Mr/Ms	String	79		
Title	String	79		
Salutation	String	79		Salutation (e.g., Dear:) to use in correspondence.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Change_Bits_High	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time Individual or Contact was created. Default is current system date.
Creation_Time	DateTime	11		

AMGR_Appointments View

The AMGR_Appointments View includes both personal and Address Book-related appointments.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling. All times are stored in Coordinated Universal Time (UTC).

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11	AMGR_Resources.Resource_Id – or – ADMN_Users.User_Id	User, location, or resource that the appointment is scheduled with. (There is a separate record for each user, location, and resource participating in the same appointment.) If the Location field includes a location that is not in the AMGR_Resources Table (Owner_Type=101), the Owner_Id value is L@FREEFORM.
App_Date	DateTime	8		Start date and time of appointment. Mandatory field.
Lead_Date	DateTime	8		Date and time when the appointment notification should take place. Default is 10 minutes prior to App_Date.

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
End_Date	DateTime	8		End date and time of appointment. Default is 30 minutes after App_Date.
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number).	Client the appointment is associated with. If filled in, the entry must exist in the AMGR_ Client View. Cannot modify.
Contact_Number	Integer	4		
Private	Integer	4		
Type	Integer	2		Identifies all records of a single appointment, group appointment, recurring appointment, or recurring group appointment. The value is 0 for a single-user appointment and is another unique value for a group, recurring, or recurring group appointment. **Note:** Recurring, group, and recurring group appointments consist of multiple records in the AMGR_Appointments Table—one for each user and one for each recurrence.
Alert_Flag	Integer	2		0 = Alarm not set 1 = Alarm set
Priority	String	4		Defines the priority text (e.g., Hi, MED, LOW).
Completed	Integer	2		0 = Appointment incomplete 1 = Appointment complete

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Icon_Type	Integer	2		Icon associated with the appointment: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting **Note:** Icons can be viewed when an appointment is being created.
Rsvp	Integer	2		User's response to appointment invitation: 0 = No response 1 = User accepts appointment 2 = Declined 3 = Tentative response Cannot modify.
Recurring_Id	Integer	2		Unique recurring ID: • 0 = Not recurring • Other unique value = Identifier for records belonging to a recurring appointment
Appt_Rec_Freq	Integer	2		Frequency of recurring appointment: 0 = Daily 1 = Weekly 2 = Day of month (e.g., first Monday) 3 = Monthly (e.g., 14th) 4 = Yearly

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Appt_Num_Occur	Integer	2		Identifies relative day of recurring appointment (e.g., second Tuesday). Applies to weekly, day of month, and monthly appointments only. **Weekly appointments:** 0 = Every ___ 1 = Every second ___ 2 = Every third ___ ... 25 = Every 26th ___ **Day of month appointments:** 0 = Every 1st ___ of the month 1 = Every 2nd ___ of the month ... 31 = Every Last ___ of the month **Monthly appointments:** 0 = First ___ of the month 1 = Second ___ of the month 2 = Third ___ of the month 3 = Fourth ___ of the month 4 = Last ___ of the month
Appt_Day_Of_ Week	Integer	2		Day of recurring appointment (e.g. , Friday). Applies to weekly, day of month, and monthly appointments only. **Weekly and Monthly appointments:** 0 = Sunday 1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday 6 = Saturday **Day of month appointments:** 0 = Day 1 = Weekday

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Skip_Weekend	Integer	2		Applies to daily appointments only. 0 = Default 1 = Daily appointments do not occur on weekends.
Move_To_Weekday	Integer	2		Applies to yearly appointments only. 0 = Default 1 = If appointment occurs on a weekend, move to nearest weekday
Rec_Start_Date	DateTime	8		Appointment start date.
Rec_End_Date	DateTime	8		Appointment end date. Mandatory if Rec_Start_Date is used.
PegBoardState	Integer	2		Peg board state during appointment: 0 = Unknown 1 = Busy 2 = Out (Default)
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Snooze_End_Date	DateTime	8		Date and time when a snoozed appointment will display a reminder.
Email_Date	DateTime	8		Date and time to send email appointment reminder. Applies only if Email_Flag is set to True (1).
Email_Flag	Integer	2		0 = Don't send email reminder 1 = Send email reminder
Owner_Type	Integer	2		0 = User 1 = Location 2 = Resource 101 = Custom Location

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Plan_Id	String	23	AMGR_ ActionPlanTemplate.(Plan_Id, Plan_ Number)	Unique identification value of the Action Plan template, as defined in AMGR_ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.
Master_Id	String	23	AMGR_CSCases. (Case_Id, Case_ Number) – or – AMGR_ Opportunity.(Opp_ Id, Opp_Number)	Identifies the customer service case or opportunity the appointment is associated with.
Master_Number	Integer	4		
Entity_Type	Integer	4		Type of record this template is applicable to. Entity_Type values correspond to the Client_Id/ Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 4 = User 5 = Customer service case 6 = Knowledge base 7 = Order 8 = Order item 9 = Default entry 100 = Custom Independent table 101 = Custom Child table
TextCol	String	1024		Text description of appointment.
Appointment_Id	String	24		Appointment identification string.
Appointment_ Number	Integer	4		Appointment identification number.

AMGR_Hotlist View

The AMGR_Hotlist View includes both personal and Address Book related tasks.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling. All times are stored in Coordinated Universal Time (UTC).

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11		If originated from AMGR_Opportunity_Link, it is the Owner Id of the Team Member responsible for the opportunity.
Schedule_Date	DateTime	8		Date of task. Mandatory field.
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Client who the task is associated with. Leave empty for a personal appointment. Otherwise it must already exist in the AMGR_Client table. Cannot modify. Contact_Number = 0–59999
Contact_Number	Integer	4		
Entry_Type	Integer	4		Flag for the source of the task. 0 = Manual task 1 = Task associated with follow-up deadline for customer service case 2 = Reserved system value. Do not use. 3 = Task created by a Date user-defined field that has the "Include in Hotlist" attribute 4 = Reserved system value. Do not use.
Original_Date	DateTime	8		Original date of the task. If left empty, it defaults to the system clock.
Type_Id	Integer	4		Pointer to date field in the Detail_ List table. Cannot modify.

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Status_Id	Integer	4		Not in use.
Priority	String	4		Priority of task.
Completed	Integer	2		0 = Not complete 1 = Complete
Opp_Id	String	23	AMGR_ Opportunity_Link. (Opp_Id, Opp_ Number, Step_Id, Activity_Id)	Identifier of the associated opportunity related to the AMGR_ Opportunity_Link that the task originated from. Must already exist in the AMGR_Opportunity_Link table. Opp_Number = 0.
Opp_Number	Integer	4		
Step_Id	Numeric	9		Must already exist in the AMGR_ Opportunity_Link table, unless it's a follow-up activity.
Activity_Id	Numeric	9		Must already exist in the AMGR_ Opportunity_Link table.
Alarm	Integer	2		0 = No alarm set 1 = Alarm set
Icon_Type	Integer	2		Icon associated with the task: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting Icons can be viewed when the Hotlist task is being created.
Lead_Date	DateTime	8		Date when alarm is to sound. If left empty, defaults to Schedule_Date.
End_Date	DateTime	8		Task end date.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Snooze_End_Date	DateTime	8		Date and time when the alarm deferral ends.
TextCol	String	255		Text of task. Mandatory field.
Related_To	Integer	4		Type of record this template is applicable to: 0 = Undefined. Defaults to Address Book. 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service
Plan_Id	String	23	AMGR_ActionPlan Template.(Plan_Id, Plan_Number)	Unique identification value of the Action Plan, as defined in AMGR_ ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.
TaskFlags	Integer	2		Determines if a Hotlist task is scheduled or timeless. 0 = Scheduled 1 = Timeless

AMGR_Resources Table

The AMGR_Resources table lists the users' display names (e.g,. Joe Napoli), locations (e.g., Staff Room), and resources (e.g., Projector) available in the Appointments dialog box.

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	Integer	4		Resource_Id's type: 1 = User display name 2 = Location 3 = Resource

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Resource_Id	String	12	ADMN_User_ Details.User_Id	Depends on Record_Type: • If Record_Type = 1 (User), then Resouce_Id = User_Id. • If Record Type = 2 (Location) or 3 (Resource), then Resource_Id is the unique ID of the location or resource.
Creator_Id	String	11		
Create_Date	DateTime	8		
Name	String	80		Friendly name of the user or resource (e.g., Joe Napoli, Staff Room, Projector). Mandatory field. Unique Name.

AMGR_Notes View

The AMGR_Notes View includes history and notes for Address Book entries, opportunities, campaigns, etc..

Note
This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11		This field actually contains the Creator_Id, not the Owner_Id.
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number) – or – AMGR_ Opportunity (Opp_ Id, Opp_Number)	Client_Id/Contact_Number or Opp_ Id/Opp_Number of the record the Note is associated with. Associated record must already exist. Mandatory field. Must provide Client_Id/Contact_Number for insert. Cannot update.
Contact_Number	Integer	4		

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Type[a]	Integer	4		Can insert. Can update. Valid values: 0–32,767 Standard Maximizer note types and Detail note types may be specified: 0 = Manual note 1 = Mail-out note 2 = Outgoing call note 3 = Timed note 4 = Transfer note 5 = Completed task or appointment 6 = Scheduled task or appointment 7 = Email sent note 8 = Opportunity created or opportunity status changes 9 = History note 10 = Reassign task note 11 = Reserved for future use 12 = Customer service 14 = Incoming call note
Private	Integer	4		
DateCol	DateTime	8		Date and time when note was created. Default is current system date and time. Can insert. Can update.
TimeCol	DateTime	8		
NewRecord	Integer	4		Maximizer system field. Do not use.
Owned_By_Id	String	11		
Record_Id	Integer	4		
Note_Type	String	20		Within Maximizer, this string is used only for display purposes to indicate a sub-type of note. If a standard type is defined in the Type field, this string is appended to the standard type name for display. In Maximizer, this field appears as Category on the Note dialog box for manual notes only. Can insert. Can update.

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
ReadPriv	Integer	2		
ReadOnly_Id	String	11		
SynchFlags	Integer	4		Do not use this field. It is reserved for use by MaxExchange.
Entity_Type	Integer	2		Specifies the type of parent record the note belongs to. Entity_Type values correspond to the Client_Id/ Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service case 10 = Appointment 100 = Custom Independent table 101 = Custom Child table This field must be specified upon note insert, and it cannot be updated later.
TextCol[b]	Text	9216		Text of Note, without HTML tags. Can insert. Can update.
RichText[b]	Text	No limit		Text of Note, including HTML tags. Can insert. Can update.
NoteFlags	Integer	2		0 = Note is not flagged. 1 = Note is flagged as important.

a. Some Maximizer functions, such as purging, searching, and MaxExchange synchronization, do not support user-defined note types, which have a Type value greater than 17.

b. If both TextCol and RichText are populated, the value in the RichText field is used as the note. If the RichText field is not null and a note is inserted into the TextCol field or the TextCol field is updated, the information in the RichText field must be set to null.

CMGR_Auto_Campaign_Accounts Table

The CMGR_Auto_Campaign_Accounts Table contains details about the Address Book entries that are subscribed to an automated campaign.

Table 8 CMGR_Auto_Campaign_Accounts Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
CampID	String	24	AMGR_ Opportunity.Opp_ Id	Unique identifier of the campaign. Insert operations are allowed, but not delete and update operations.
ClientID	String	24	AMGR_Client. (Client_Id, Contact_ Number)	Client_Id and Contact_Number of Address Book entries subscribed to the campaign. Insert operations are allowed, but not delete and update operations.
ContactNo	Integer	4		
StartDate	DateTime	8		Date when the Address Book entry was subscribed to the campaign.
NextDate	DateTime	8		Date when the next campaign activity for the Address Book entry should be processed. Applies to ongoing campaigns.
AccStatus	Integer	4		Not in use.
ActCount	Integer	4		Next campaign activity to process for the Address Book entry.
ActType	Integer	4		Not in use.
ActFlag	Integer	4		Not in use.

AMGR_CSCases View

The AMGR_CSCases View stores information about customer service cases.

Note
This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 9 AMGR_CSCases View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		

Table 9 AMGR_CSCases View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	Integer	4		0 = Customer service case 1 = Customer service user
Case_Id	String	23		Unique customer service case identifier. Case_Number is always 0.
Case_Number	Integer	4		
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Reference to client.
Client_Number	Integer	4		
Contact_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Reference to default contact.
Contact_Number	Integer	4		
Status	Integer	4		Case status: 57999 = Unassigned 57998 = Assigned 57997 = Escalated 57996 = Callback 57995 = WaitCustomer 57994 = Cancelled 57993 = Resolved Pointer to value in System UDFs (60041).
Priority	Integer	4		Case priority: 57900 = Low 57901 = Medium 57902 = High
Severity	Integer	4		Case severity: 57900 = Low 57901 = Medium 57902 = High
Type	Integer	4		Case type. Pointer to value in system UDFs (60022).
Reason	Integer	4		Case reason. Pointer to value in system UDFs (60023).
Origin	Integer	4		Case origin. Pointer to value in system UDFs (60024).

Table 9 AMGR_CSCases View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Queue	Integer	4		Case queue. Pointer to value in system UDFs (60029).
Class	Integer	4		No longer in use.
Area	Integer	4		No longer in use.
Fee	Float	8		Case fee. (BillRate x BillableTime = Fee).
BillRate	Float	8		Cost per hour of billable time.
BillableTime	Float	8		Number of billable hours.
Fee_Type	Integer	4		Case fee type. Pointer to value in system UDFs (60027).
Assigned_To_Id	String	11	ADMN_User_ Details.User_Id	User_Id of user who the case is assigned to.
Deadline_Date	DateTime	8		Follow-up deadline date.
Creator_Id	String	11		
Create_Date	DateTime	8		
Modified_By_Id	String	11		
Last_Modify_Date	DateTime	8		
Owner_Id	String	11		Case owner.
Private	Integer	4		Not in use.
Solution_Id	String	24	AMGR_Documents. (Document_Id, Document_ Number)	For resolved cases, it points to a knowledge base article with the case solution.
Solution_Number	Integer	4		
Subject	String	128		Subject line of the case.

Table 9 AMGR_CSCases View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Article_Number	String	24	AMGR_Documents. (Document_Id, Document_ Number)	Points to the solution article in AMGR_Documents table when the Solution_Id and Solution_Number fields are empty. This field is intended for remote users who don't have access to the knowledge base database but know the article number for this case in the main database. The remote user fills in this field manually, and when the case is synchronized with the main database, it will reference the article in the knowledge base.
Notify_Flag	Integer	4		Customer service case notification flag: 0 = Notification disabled 1 = Notification sent to default list of users 2 = Notification sent to custom list of users
Case_Resolved_By	String	12	ADMN_Users.User_ Id	User ID of the user who resolved the case.
Case_Resolved_ Date	DateTime	8		Date and time when the case was resolved.
Case_Owner_Id	String	12		
Description	Text	16		Description of the case.

CSCases_View

The CSCases_View View includes all the fields from the AMGR_CSCases Table and the following additional fields.

Note

This view is read-only.

Table 10 CSCases_View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
User_Case_Id	String	32		Case identifier for user references.
Client_Name	String	80	AMGR_CSCases. (Client_Id, Client_ Number)	Name of Company/Individual who originated the case. Name field from AMGR_Client table.
Contact_Name	String	160	AMGR_CSCases. (Contact_Id, Contact_Number)	Name of the contact for the case. "First_Name, Name" field concatenation from Case Contact.
Solution_Name	String	256	AMGR_CSCases. (Solution_Id, Solution_Number)	Knowledge base article description of this case.
Type_Name	String	80	AMGR_User_Field_ Defs_Tbl.(Type_Id = 60022, Table_Id = 2, Code_Id)	Text value of the Type field
Reason_Name	String	80	AMGR_User_Field_ Defs_Tbl.(Type_Id = 60023, Table_Id = 2, Code_Id)	Text value of the Reason field.
Origin_Name	String	80	AMGR_User_Field_ Defs_Tbl.(Type_Id = 60024, Table_Id = 2, Code_Id)	Text value of the Origin field.
Queue_Name	String	80	AMGR_User_Field_ Defs_Tbl.(Type_Id = 60029, Table_Id = 2, Code_Id)	Text value of the Queue field.
Class_Name	String	80		No longer in use.
Area_Name	String	80		No longer in use.

Table 10 CSCases_View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Fee_Type_Name	String	80	AMGR_User_Field_Defs_Tbl.(Type_Id = 60027, Table_Id = 2, Code_Id)	Text value of the Fee_Type field.
Status_Name	String	80	AMGR_User_Field_Defs_Tbl.(Type_Id = 60041, Table_Id = 2, Code_Id)	Text value of the Status field: 57999 = Unassigned 57998 = Assigned 57997 = Escalated 57996 = Callback 57995 = WaitCustomer 57994 = Cancelled 57993 = Resolved
Assigned_To_Name	String	160		Name of the user responsible for the case.
Case_Owner_Name	String	160		Name of the user who owns the case.
Address_Line_1	String	80		Address information of the Company/Individual who originated the case.
Address_Line_2	String	80		
City	String	80		
State_Province	String	80		
Country	String	80		
Zip_Code	String	80		
Priority_Name	String	80		Text value of the Priority field: 57900 = Low 57901 = Medium 57902 = High
Severity_Name	String	80		Text value of the Severity field: 57900 = Low 57901 = Medium 57902 = High

Amgr_Opportunity View

The AMGR_Opportunity View contains information about

- Sales opportunities (Opp_Type=0),
- Traditional marketing campaigns (Opp_Type=30), and

Automated marketing campaigns (Opp_Type=10, 15, or 20).

Note
This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Opportunities

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Client_Id	String	24	AMGR_Client. (Client_Id, Contact_ Number)	Company/Individual that is associated with the opportunity. Mandatory field. Associated entry must already exist in the AMGR_ Client table. Cannot modify.
Contact_Number	Integer	4		Not used. Reserved for future use. Always 0.
Opp_Id	String	23	AMGR_ Opportunity_Link. (Opp_Id, Opp_ Number)	Unique identifier of an Opportunity. System generated.
Opp_Number	Integer	4		Unique identifier of an Opportunity. Must be 0.
Comp_Client_Id	String	24	AMGR_ Opportunity_Link. (Client_Id, Contact_ Number)	Client_Id and Contact_Number of Competitor that the Opportunity was lost to.
Comp_Cont_No	Integer	4		
Owner_Id	String	11		Team member that is chosen as the Opportunity leader. If Team ID is equal to -1 (no Team is assigned, i. e., this is a Personal Opportunity), then it defaults to the Login ID.

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Strategy_Id	Numeric	9	AMGR_Strategy. Strategy_Id	Strategy that has been assigned to the Opportunity. Strategy_Id must already exist in the AMGR_ Strategy table. If the strategy is 4294967295 (0xFFFFFFFF), no strategy is assigned to the Opportunity.
Team_Id	Integer	4	EXCH_Sites. (Owner_Id, Team_ Id)	Team_Id of Sales team assigned to this Opportunity, or 65535 (0xFFFF) if assigned to a single user. Team_ Id must already exist in EXCH_Sites table. Mandatory field.
Status	Integer	4		Status of the Opportunity: 0 = New 1 = In progress 2 = In progress new 3 = Won 4 = Lost 5 = Abandoned 6 = Suspended
Name	String	80		Name of Company/Individual that is associated with the Opportunity.
Objective	String	254		Sales Objective for the Opportunity.
Reason_Id	Numeric	9	AMGR_OMS_ Object.Step_Id	Reason why the opportunity was won, lost, abandoned, or suspended. Only the Opportunity Leader user can modify this field. 0 = Opportunity still in progress
Probability_Closing	Integer	2		Percentage probability of closing the opportunity. Based on an internal calculation formula. Valid values: 0–100. Only the Opportunity Leader user can modify this field. (May be updated automatically by selecting "Update Opportunity" in Opportunities window.)
Cost	Float	8		Running total of the costs associated with activities for the opportunity.

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Forecast_Revenue	Float	8		Revenue anticipated from Opportunity once it is successfully complete. Only the Opportunity Leader user can modify this field.
Start_Date	DateTime	8		Date when the opportunity was started. If left empty, defaults to the system clock. If 1, only the Opportunity Leader user can modify this field.
Estimated_Close_Date	DateTime	8		Start_Date + Strategy Duration = Estimated_Close_Date. Original close date for the opportunity. Must be greater than Start_Date. Only the Opportunity Leader user can modify this field. If specified, becomes the Close_Date by default.
Close_Date	DateTime	8		Projected or actual close date of the opportunity. Updated as the opportunity's steps are applied before or ahead of schedule. Must be greater than Start_Date. Only the Opportunity Leader user can modify this field.
Last_Modify_Date	DateTime	8		Close date specified by user, not calculated from steps and activities. (Date and time when campaign was last modified stored in Last_Update_Date.)
Actual_Revenue	Float	8		Actual revenue generated by the opportunity. Applicable only if Status = 3.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Suspend_Date	DateTime	8		The date an opportunity was suspended. Applies only to opportunities using a strategy.

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Days_Suspended	Integer	4		The number of days an opportunity was suspended. Applies only to opportunities using a strategy, where the opportunity is suspended and then resumed after one day or more.
Dynamic_Strat	Integer	2		0 = Static strategy 1 = Dynamic strategy **Note:** A strategy becomes dynamic after it has been assigned to an opportunity and then one or more of the Steps has been modified in that opportunity.
Dynamic_Team	Integer	2		0 = Static team 1 = Dynamic team **Note:** A team becomes dynamic after it has been assigned to an Opportunity and then a team member is added or removed from the team for that Opportunity.
Opp_Type	Integer	2		Opportunity or campaign type: **0 = Opportunity** 10 = Fixed-date automated campaign 15 = Ongoing automated campaign 20 = Automated campaign from web 30 = Traditional campaign
Comment	String	508		Any comments about the opportunity. Only the Opportunity Leader user can modify this field.
Completion_ Comment	String	508		Any comments related to the completion of the opportunity. Applicable only if the Status is won, lost, abandoned, or suspended.
Last_Update_Date	DateTime	8		Date and time when the record was last modified.
Updated_By_Id	String	11	ADMN_Users.User_ Id	User_Id of the user who last changed the opportunity.

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
TestStatus	Integer	4		Applies only to records where Opp_Type = 10, 15, or 20.
Last_Opp_Id	String	23		Stores original Opp_Id when it is changed during transfer between databases.
Cont_Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Client_Id of the associated Contact. Applicable only when Opp_Type = 0.
Cont_Cont_No	Integer	4		Contact_Number of the associated Contact. Applicable only when Opp_Type = 0.
NextAction	String	63		Next action in the Action Plan for this opportunity, as defined by the user. Applicable only when Opp_ Type = 0.
NextAction_ Projected	String	63		Next action in the Action Plan for this opportunity, as defined by the strategy. Applicable only when Opp_Type = 0.
Revenue_Currency_ Id	String	4		Three-character currency ID of the corporate or entry currency for the opportunity. Applicable only if multi-currency is enabled for the Address Book.
Revenue_Rate_ Type_Id	Integer	2		Reserved for future use. Do not use.
Last_Cal_Date	DateTime	8		Not applicable to opportunities.
Calculated_Won_ Revenue	Float	8		Not applicable to opportunities.
Calculated_ InProgress_ Revenue	Float	8		Not applicable to opportunities.
Notify_Flag	Integer	4		0 = No opportunity monitoring 1 = Use the system default opportunity monitoring user list 2 = Use a custom list

Automated Campaigns

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_ Number)	Not applicable.
Contact_Number	Integer	4		Not used. Reserved for future use. Always 0.
Opp_Id	String	24	CMGR_Auto_ Campaign_ Accounts.(CampID)	Unique identifier of an automated campaign. System generated.
Opp_Number	Integer	4		Always 0.
Comp_Client_Id	String	24	AMGR_ Opportunity_Link. (Client_Id, Contact_ Number)	Not applicable to campaigns.
Comp_Cont_No	Integer	4		
Owner_Id	String	11		Team member that is chosen as the Opportunity Leader. If Team ID is equal to -1 (no team is assigned, i. e., this is a personal opportunity), then it defaults to the Login ID.
Strategy_Id	Numeric	9		ProgID of the automated campaign.
Team_Id	Integer	4		Always 65535 (0xFFFF) (single user). Mandatory field.
Status	Integer	4		Status of the campaign: 0 = New 1 = In progress 2 = In progress new 3 = Completed 5 = Abandoned 6 = Suspended
Name	String	80		Name of the automated campaign.
Objective	String	254		Name of the template used for the campaign.

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Reason_Id	Numeric	9	AMGR_OMS_ Object.Step_Id	Reason why the campaign was completed, abandoned, or suspended. Only the Campaign Leader user can modify this field. 0 = Campaign still in progress
Probability_Closing	Integer	2		Not applicable to campaigns. Always 0.
Cost	Float	8		Campaign budget.
Forecast_Revenue	Float	8		Revenue expected from campaign once it is successfully complete. Only the Campaign Leader user can modify this field.
Start_Date	DateTime	8		Start date of the automated campaign.
Estimated_Close_ Date	DateTime	8		Not applicable to campaigns.
Close_Date	DateTime	8		Actual close date of the campaign. Must be greater than Start_Date. Only the Campaign Leader user can modify this field.
Last_Modify_Date	DateTime	8		Close date specified by user. (Date and time when campaign was last modified stored in Last_Update_ Date.)
Actual_Revenue	Float	8		Actual revenue generated by the campaign. Applicable only if Status = 3.
Record_Id	Integer	4		
Creator_Id	String	12		
Create_Date	DateTime	8		
Suspend_Date	DateTime	8		Not applicable to automated campaigns.
Days_Suspended	Integer	4		Not applicable to automated campaigns.
Dynamic_Strat	Integer	2		Not applicable to automated campaigns.

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Dynamic_Team	Integer	2		Not applicable to automated campaigns.
Opp_Type	Integer	2		Opportunity or campaign type: 0 = Opportunity **10 = Fixed-cate automated campaign** **15 = Ongoing automated campaign** **20 = Automated campaign from web** 30 = Traditional campaign
Comment	String	508		Description of the campaign. Only the Campaign Leader user can modify this field.
Completion_ Comment	String	508		Any comments related to the completion of the Campaign. Applicable only if the Status is Complete, Abandoned, or Suspended.
Last_Update_Date	DateTime	8		Date and time when the record was last modified.
Updated_By_Id	String	11	ADMN_Users.User_ Id	User_Id of the user who last changed the campaign.
TestStatus	Integer	4		0 = Not tested 1 = Tested Applies only to records where Opp_Type = 10, 15, or 20.
Last_Opp_Id	String	23		Applicable only when Opp_Type = 0.
Cont_Client_Id	String	23		Applicable only when Opp_Type = 0.
Cont_Cont_No	Integer	4		Applicable only when Opp_Type = 0.
NextAction	String	64		Applicable only when Opp_Type = 0.
NextAction_ Projected	String	64		Applicable only when Opp_Type = 0.

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Revenue_Currency_Id	String	4		Not applicable to campaigns.
Revenue_Rate_Type_Id	Integer	2		Reserved for future use. Do not use.
Revenue_Rate_Type_Id	Integer	2		Reserved for future use. Do not use.
Last_Cal_Date	DateTime	8		Opportunity revenue is calculated as of the date specified in this field. Default is the current date.
Calculated_Won_Revenue	Float	8		Revenue generated from won opportunities.
Calculated_InProgress_Revenue	Float	8		Revenue generated from opportunities still in progress.
Notify_Flag	Integer	4		Not applicable for Automated Campaigns.

Traditional Campaigns

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Client_Id	String	23		Not applicable.
Contact_Number	Integer	4		Not used. Reserved for future use. Always 0.
Opp_Id	String	23		Unique identifier of a traditional campaign. System generated.
Opp_Number	Integer	4		Always 0.
Comp_Client_Id	String	24		Not applicable to campaigns.
Comp_Cont_No	Integer	4		

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Owner_Id	String	11		Team member that is chosen as the Opportunity Leader. If Team ID is equal to -1 (no team is assigned, i. e., this is a personal opportunity), then it defaults to the Login ID.
Strategy_Id	Numeric	9	AMGR_Strategy. Strategy_Id	Strategy_Id of the Template that has been assigned to the Campaign. Strategy_Id must already exist in the AMGR_ Strategy table. If the strategy is 4294967295 (0xFFFFFFFF), no template is assigned to the campaign.
Team_Id	Integer	4	AMGR_ Opportunity. (Owner_Id, Team_ Id) = EXCH_Sites. (Owner_Id, Team_ Id)	Team_Id of the Sales team assigned to the campaign, or 65535 (0xFFFF) if assigned to a single user. Team_Id must already exist in EXCH_Sites table. Mandatory field.
Status	Integer	4		Status of the campaign: 0 = New 1 = In progress 2 = In progress new 3 = Completed 5 = Abandoned 6 = Suspended
Name	String	80		Name of the traditional campaign.
Objective	String	254		Marketing objective of the traditional campaign.
Reason_Id	Numeric	9	AMGR_OMS_ Object.Step_Id	Reason why the campaign was completed, abandoned, or suspended. Only the Campaign Leader user can modify this field. 0 = Campaign still in progress
Probability_Closing	Integer	2		Not applicable to campaigns. Always 0.
Cost	Float	8		Campaign budget.

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Forecast_Revenue	Float	8		Potential revenue anticipated from campaign once it is successfully completed. Only the Campaign Leader user can modify this field.
Start_Date	DateTime	8		Start date of a traditional campaign that is not using a template. Null for campaigns using a template.
Estimated_Close_Date	DateTime	8		Not applicable to campaigns.
Close_Date	DateTime	8		Actual close date of the campaign. Updated as the campaign's steps are applied before or ahead of schedule. Must be greater than Start_Date. Only the Campaign Leader or MASTER user can modify this field.
Last_Modify_Date	DateTime	8		Not applicable to Opp_Type = 30. (Date and time when campaign was last modified stored in Last_Update_Date.)
Actual_Revenue	Float	8		Actual revenue generated by the Campaign. Applicable only if Status = 3.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Suspend_Date	DateTime	8		The date the campaign was suspended. Applies only to campaigns using a template.
Days_Suspended	Integer	4		The number of days a campaign was suspended. Applies only to campaigns using a template, where the campaign is suspended and then resumed after one day or more.

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Dynamic_Strat	Integer	2		0 = Static template 1 = Dynamic template **Note:** A template becomes dynamic after it has been assigned to a campaign and then one or more of the Steps has been modified in that campaign.
Dynamic_Team	Integer	2		0 = Static team 1 = Dynamic team **Note:** A team becomes dynamic after it has been assigned to a campaign and then a team member is added or removed from the team for that campaign.
Opp_Type	Integer	2		Opportunity or campaign type: 0 = Opportunity 10 = Fixed-date automated campaign 15 = Ongoing automated campaign 20 = Automated campaign from web **30 = Traditional campaign**
Comment	String	508		Any comments about the campaign. Only the Campaign Leader or MASTER user can modify this field.
Completion_ Comment	String	508		Any comments related to the completion of the campaign. Applicable only if the Status is complete, abandoned, or suspended.
Last_Update_Date	DateTime	8		Date and time when the record was last modified.
Updated_By_Id	String	11	ADMN_Users.User_ Id	User_Id of the user who last changed the campaign.
TestStatus	Integer	4		Applies only to records where Opp_Type = 10, 15, or 20.
Last_Opp_Id	String	23		Applicable only when Opp_Type = 0.

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Cont_Client_Id	String	24		Applicable only when Opp_Type = 0.
Cont_Cont_No	Integer	4		Applicable only when Opp_Type = 0.
NextAction	String	64		Applicable only when Opp_Type = 0.
NextAction_ Projected	String	64		Applicable only when Opp_Type = 0.
Revenue_Currency_ Id	String	4		Not applicable to campaigns.
Revenue_Rate_ Type_Id	Integer	2		Reserved for future use. Do not use.
Last_Cal_Date	DateTime	8		Not applicable to traditional campaigns.
Calculated_Won_ Revenue	Float	8		Not applicable to traditional campaigns.
Calculated_ InProgress_ Revenue	Float	8		Not applicable to traditional campaigns.
Notify_Flag	Integer	4		Not applicable to traditional campaigns.

AMGR_Opportunity_Link Table

The AMGR_Opportunity_Link Table links various opportunity- and traditional campaign-related information with other tables. The type of information and tables it links depend on the value of the "Type" field. The use of numerous fields in this table also depends on the value of the "Type" field.

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Opp_Id	String	24	AMGR_ Opportunity.(Opp_ Id, Opp_Number) – or – AMGR_Client. (Client_Id, Contact_ Number)	Unique identifier of an opportunity or campaign. System generated. Opp_Number is always 0. Refer to AMGR_Client(Client_Id, Contact_Number) when Type =23.
Opp_Number	Integer	4		
Step_Id	Numeric	9		Unique identifier of the step the activity belongs to. Mandatory field. Cannot modify.
Activity_Id	Numeric	9		ID of the activity linked to the step. Mandatory field. Value must already exist in AMGR_OMS_ Object. Cannot modify. If Type = 1: Unique identifier of the activity. Otherwise, always 0.
Type	Integer	4		1 = Activity link for opportunity/ campaign step 2 = Step link for opportunity/ campaign 3 = Success factor standing link for opportunity/campaign 4 = Success factor standing link for opportunity role 5 = No longer used 8 = Competitor link for opportunity 13 = Contact link for opportnity/ campaign role 14 = Related entry link 15 = Company Library folder or document reference 20 = Partner link for opportunity 21 = Customer service notification default user 22 = Customer service notification user 23 = Partner link for Address Book entry

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Client_Id	String	24	AMGR_ Opportunity_Link. (Client_Id, Contact_ Number) = AMGR_ Client. (Client_Id, Contact_ Number) AMGR_ Opportunity_Link. (MesName = AMGR_User_Fields. (Client_Id) for Type_Id = 17 in AMGR_User_Fields	Company or Individual that is associated with the opportunity. Mandatory field. Associated entry must already exist in the AMGR_ Client table. Cannot modify.
Contact_Number	Integer	4		
Status	Integer	2		0 = New 1 = In progress 2 = In progress new 3 = Won 4 = Lost 5 = Abandoned 6 = Suspended 3337 = Not applied 3338 = Reviewed 3339 = Behind 3340 = On schedule 3341 = Ahead 3342 = Complete 3676 = Waiting 3677 = Applied (Hotlist entry must exist with same Activity_Id)
Duration	Numeric	9		Duration of the activity or step, in seconds. Value must be between 0 and 2,500,000,000.0. Applicable only if Type = 1 or 2.
Cost	Float	8		Running total of the costs associated with activities of the opportunity. Value must be between 0.0 and 9,999,999,999.0. Applicable only if Type = 1 or 2.

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Start_Date	DateTime	8		Date when the activity or step starts. If left empty, defaults to the system clock time. If 1, the date can be updated by the OppLeader only. Applicable only if Type = 1, 2, or 15.
End_Date	DateTime	8		Date when the activity or step ends.
Start_Time	DateTime	8		Time when the activity or step starts. If 01/01/1900, not followed by a time, then there is no start time.
Icon_Type	Integer	2		0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting **Note:** Icons can be viewed when a record is being created or modified.
Alarm	Integer	2		0 = Alarm not set 1 = Alarm set

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Alarm_Lead_Min	Integer	4		Lead time for alarm, in minutes. Value must be between 0 and 5,000,000.0. Up to 999 complete minutes, hours, days, or weeks can be entered in the GUI. (No partial minutes, days, or weeks.) Once 999 minutes has been reached the number must first be rounded up to the nearest whole hour and then converted back to minutes. (I. e., 1000 minutes is rejected but 1020 —17 hours— is accepted.) Once 999 hours has been reached the number must be converted to days and then back to minutes. The same theory applies once 999 days and weeks have been reached.
Resp_Mem_Id	Integer	4		ID of the team member responsible for activity. Applicable only if Type = 1.
With_Role_Id	Numeric	9		ID of the role that this activity is to be assigned to. Applicable only if Type = 1.
Priority	String	4		Priority (HI, LOW, MED, etc.) Applicable only if Type = 1.
Standing_Id	Numeric	9		ID of the Standing associated with this role. Applicable only if Type = 3, 4, or 15.
Score	Integer	2		Value (weight) of the success factor standing. Valid values: 0–100. Applicable only if Type = 1, 3, 4, or 15.
MesName	String	256		For Type = 15, contains names of folders, documents, and notes in the Company Library. For Type = 14 (related entries), contains relation id. This field is related to the Client_Id field in the AMGR_User_Fields where Type_Id = 60017.

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
Creator_Id	String	12		
Create_Date	DateTime	8		
Follow_Up_Task	Integer	2		Applicable only if Type = 1 (Activity): 0 = No follow-up task 1 = Follow-up task
Opp_Type	Integer	2		Record type: 0 = Opportunity 10 = Automatic campaign 15 = Automatic recurring campaign 20 = Automatic campaign from web 30 = Traditional campaign
NotReserved	String	22		Not in use.
Description	String	254		Description of the opportunity or campaign.

ADMN_User_Details Table

The ADMN_User_Details table contains personal information on Maximizer users.

Table 15 ADMN_User_Details Table

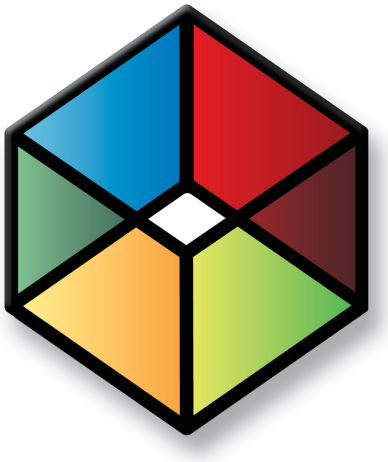
Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Type	Integer	4		
User_Id	String	11		
Old_Password	String	511		
User_MrMs	String	80		
User_FirstName	String	80		
User_Init	String	80		
User_Name	String	80		
User_Title	String	80		
User_Salutation	String	80		
User_Firm	String	80		

Table 15 ADMN_User_Details Table (Continued)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
User_Route	String	80		
User_Div	String	80		
User_AddressLine1	String	80		
User_AddressLine2	String	80		
User_City	String	80		
User_State_Province	String	80		
User_Zip_Code	String	80		
User_Country	String	80		
User_Phone_1	String	22		
User_Phone_1_Extension	String	22		
User_Phone_2	String	22		
User_Phone_2_Extension	String	22		
User_Phone_3	String	22		
User_Phone_3_Extension	String	22		
User_Phone_4	String	22		
User_Phone_4_Extension	String	22		
User_Email_Address	String	120		
User_WebSite	String	120		
User_CustomField1	String	120		
User_CustomField2	String	120		
User_CustomField3	String	120		
User_CustomField4	String	120		
Creator_Id	String	12		
Create_Date	DateTime	8		
LastUpdate_Date	DateTime	8		
User_ReadAccess	Integer	4		
WindowLogin	String	33		

Table 15 ADMN_User_Details Table (Continued)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Display_Name	String	80		Not in use. **Note:** The user's display name is stored in the AMGR_Resources Table.
Record_Id	Integer	4		
Reports_To	String	12		The user ID of the person the user reports to. This information is used in organizational charts generated by Maximizer.



APPENDIX C

Glossary of Terms

Glossary of Terms

Use this list of terms to help familiarize yourself with the terminology of Maximizer CRM.

Access Rights – security settings for users. Access rights control each user's permissions to read, insert, modify, or delete various types of Maximizer entries. They also control general Maximizer privileges, user roles, and allowed printing destinations. Access rights are determined by the user's access settings and the access settings of any security groups the user belongs to.

Access Settings – there are two types of access settings: user access settings and group access settings. Combined user and group access settings determine a user's access rights.

Accounting Link – a Maximizer add-on that enables users to connect to QuickBooks , Microsoft Dynamics GP, and Sage 50 Accounts through Maximizer. For more information, refer to the *Accounting Link User's Guide* or the Maximizer website.

Address Book – a Maximizer database.

Address Book entry – a Company, Individual, or Contact in the Maximizer Address Book.

Administrator – a Maximizer module in which the Address Book administrator can perform system configuration and maintenance for the Maximizer system and Address Books.

Administrator's Guide – a Maximizer reference guide for system administrators.

Advanced Import – importing an MXI or XML file into an Address Book.

Application Server – see Maximizer Application Server.

automated campaign – a series of automated email messages, faxes, or printed documents that Maximizer sends on a predefined schedule. An automated campaign is based on an automated campaign template.

Calendar – a Maximizer window in which you can manage your appointments.

campaign template – a pre-defined strategy used by email and traditional marketing campaigns. See automated campaign and traditional campaign.

catalog – a product listing created using OrderDesk. You build your catalog by adding sections and catalog items, and publish the catalog on your web server.

catalog item – an individual product or service in your online catalog.

catalog section – a category for classifying types of catalog items.

Company – an Address Book entry used to record information for a company or organization.

Company Library – a shared library of company literature.

Contact – an Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

Controlling window – a main Maximizer window, such as the Address Book window, that determines what tabbed following windows are displayed. The contents of the following window depend on which entry is selected in the main controlling window.

Crystal Reports – a tool for generating reports. Crystal reports are available for viewing and generation through the Reports tab in Maximizer.

dashboards – components of Maximizer and Maximizer Web Access that display real-time information on your company using dashboard-style instrumentation.

default entry – an entry (such as an Address Book entry) containing default field values that are propagated to new entries by default.

Escona – the Escona Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer's possibilities.

Following window – a tabbed sub-window of a controlling window. The contents of the following window depend on which entry is selected in the main controlling window. For example, the Contacts window displays only those Contacts that belong to the selected entry in the Address Book window.

Global Edit – a Maximizer operation that enables you to apply the same change to multiple Maximizer entries simultaneously.

Holiday Editor – a tool in Administrator for adding holidays to the Maximizer Calendar window.

Hotlist – a window in Maximizer used to display tasks and appointments in a specific date range.

HTML – HyperText Markup Language. A document format used for displaying web pages in a browser.

IIS – see Microsoft Internet Information Server.

intranet – an internal network—much like the Internet—that is self-contained with the local area network (LAN). Frequently, a web server is used to display pages that should be accessible only within the company.

IP address – a number used to uniquely identify a specific computer on a network. Every network-connected computer has an IP address. In Maximizer, you use the IIS server's IP address when you preview or publish your online catalog.

Knowledge base – a database containing articles pertaining to solutions for customer service and/or technical issues.

lead – an Address Book entry that has been flagged as a potential client or customer.

list – a listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

log in – the act of entering your user ID and password to gain access to a Maximizer Address Book. The Login dialog box prompts you for your user ID and password.

marketing team – used with campaigns to organize marketing efforts in a team environment. Set up using Administrator.

MASTER user – the Address Book administrator's user ID. This user ID permits access to Administrator.

MaxExchange Site Manager – a utility for creating and managing sales and marketing teams. MaxExchange Site Manager is accessed through Administrator.

MaxExchange – a Maximizer program used to synchronize an Address Book between a central server and remote distribution sites via FTP, email, or a direct network connection.

Maximizer – a Maximizer module in which you can perform contact management and sales force automation activities.

Maximizer Application Server – the principal Windows Server where you install Maximizer.

Maximizer Remote Workstation (MaxExchange Remote) – a computer that has the Maximizer client components installed and connects to the Maximizer Application Server.

merge field – text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact's name, so you can customize a letter's salutation with the recipient's name.

Microsoft Internet Information Server – Microsoft web server software. Internet Information Server—or "IIS"—is used for many of the Maximizer components.

Microsoft SQL Server – a database server used by Maximizer for the Address Book data.

Microsoft Windows Server – the operating system used by the servers.

note – a text document attached to Address Book entries, Contacts, opportunities, and campaigns.

OLE – object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents

window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

online – information that is "online" is sometimes used to describe information on the Internet or on your computer screen. An "online" user guide or "online" Help is documentation displayed on your screen.

opportunity – an entry in Maximizer used to record an opportunity to make a sale. Opportunities can organize a sales team using a structured sales strategy.

OrderDesk – a window in Maximizer used to manage orders and inquiries from your online catalog.

Outlook Synchronization – a Maximizer feature for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and Microsoft Outlook.

preferences – a collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator; some are set in the modules.

prospect – a potential customer. ListsNOW.com lets you acquire and import lists of prospects. You can then use the data for your marketing campaigns or sales prospecting activities.

related entries – an entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

sales team – a team created using Administrator to support team-based work on sales opportunities in Maximizer.

search engine – a website on the Internet that keeps a searchable index of websites. You can register your website with a search engine so customers can find your site by performing a search. Examples of search engines are Google and Yahoo!.

security group – a set of access settings for a subset of Maximizer users.

strategies – a structured, team-based approach to pursuing sales opportunities. Strategies define the steps, activities, and roles involved in successfully completing a sale.

SMTP – an SMTP server is a server used for outgoing Internet email.

SQL – see Microsoft SQL Server.

template – a file that outlines the design for a document, email message, or web page. Maximizer uses templates for word processor documents, and for automated activities that belong to automated campaigns. Templates can contain merge fields for bulk mailings. Also, see Campaign Template.

traditional campaign – used to organize a marketing effort, including a marketing team's steps, activities, and roles.

transaction processing – credit card transactions can be processed from your online catalog using a transaction processing company.

UNC – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is "\\Escona\MxServer\".

user-defined field – a custom field used to record additional "user-defined" information for Address Book entries, opportunities, campaigns, customer service cases, and users.

user ID – a name that uniquely identifies a Maximizer user. Users must enter their user ID and password in order to gain access to a Maximizer Address Book.

virtual directory – an IIS folder that "points" to a physical location on the server. The contents of the physical folder that the virtual directory refers to is accessible to the Internet or intranet via the IIS server.

Windows Server – see Microsoft Windows Server.

wizard – a series of interactive screens that walk you through the steps necessary to perform an action or procedure in a program.

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